DOCUMENT RESUME

ED 250 449 CE 039 856

TITLE	Proffitt, Dorsey & Huff, Inc. An Administrative Assistant Position Simulation. Administration Manual. Office Occupations.
INSTITUTION	Pickens Area Vocational-Technical School, Jasper, Ga.
SPONS AGENCY	Georgia State Dept. of Education, Atlanta. Office of Vocational Education.
PUB DATE	82
NOTE	160p.; For related documents, see CE 039 857-858.
PUB TYPE	Guides - Classroom Use - Guides (For Teachers) (052)
EDRS PRICE	MF01/PC07 Plus Postage.
DESCRIPTORS	Accounting; Behavioral Objectives; Business Communication; Business Correspondence; Business English; *Business Skills; Classroom Techniques; Guidelines; Instructional Materials; Insurance Companies; Job Skills; Learning Activities; Letters (Correspondence); *Office Management; *Office Occupations Education; *Office Practice; *Personnel Management; Postsecondary Education; Recordkeeping; *Simulation; State Curriculum Guides; Teaching Methods; Typewriting; Writing Skills
IDENTIFIERS	*Administrative Assistants; Georgia

ABSTRACT

This instructor's guide, one of three volumes designed for use in implementing an administrative assistant simulation for students enrolled in a postsecondary-level office applications laboratory, includes 20 jobs or tasks that are likely to be required of an administrative assistant working at an independent insurance agency that is both a sales and a service organization. Representative tasks covered in the simulation are: completing an employment application and interview, establishing a reference file, performing various typing and dictation tasks, composing and editing letters and reports, mailing out correspondence, performing various accounting functions, resolving personnel problems, and composing and typing out assorted employee records and forms. Each job occupies a separate section containing some or all of the following: a job description, instructor evaluation criteria, a job scoring sheet, information sheets, sample forms, an assignment, and one or more tests. Also supplied in this instructor's guide are an organization chart, a position description, a flow-of-work chart, a discussion of the instructor's role in the simulation, and an introduction to the simulation. (MN)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

GA831 3309

OFFICE OCCUPATIONS

Proffitt, Dorsey & Huff, Inc.

An Administrative Assistant Position Simulation

ED250449

Administration Manual

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

This document has been reproduced as received from the person or organization originating it.
Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

A. Houston

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

CE 039856

Georgia Department of Education

OFFICE OCCUPATIONS

Developed and Produced
Under Contractual Agreement with

Division of Program Development
Office of Vocational Education
Georgia Department of Education
Atlanta, Georgia 30334
Charles McDaniel, State Superintendent of Schools
1982

UPD 7728/7-82

PROFFITT, DORSEY & HUFF, INC.

An Administrative Assistant Position Simulation

Prepared by

Pickens Area Vocational-Technical School
Jasper, Georgia

Revised by

Georgia State University
Atlanta, Georgia

Project Supported by

Office of Vocational Education
Division of Program Development
Georgia Department of Education
Atlanta, Georgia 30334

Dr. Charles McDaniel, State Superintendent of Schools

1982

TABLE OF CONTENTS

Foreword iv

Introduction 1

General Information
About the Simulation 2
About the Company 3

Organization Chart 5

Position Description 6

Flow of Work Chart 7

Supplies, Equipment, and References 8

Instructor's Role 9

Introduction to the Simulation 9

Sample Employee Rating Form 11

Jobs 13

Important Note to Instructor 14

Answer Keys (Jobs 1 - 20) 30
Job 1 31
Job 2 32
Job 3 40
Job 4 46
Job 5 53
Job 6 59
Job 7 64
Job 8 68
Job 9 76
Job 10 81
Job 11 87
Job 12 89
Job 13 93
Job 14 96
Job 15 100
Job 16 102
Job 17 107
Job 18 113
Job 19 118
Job 20 130

FOREWORD

This administrative assistant position simulation has been developed for use in an office applications laboratory at the postsecondary level. Its purpose is to give the student an opportunity to become familiar with the tasks and duties that may be performed by an administrative assistant.

Appreciation is expressed to Mr. K. Gerald Allen, Project Coordinator and to Mrs. Nancy Dorsey and Mrs. Nancy Proffitt, business education instructors, for the development of these materials.

Appreciation is also expressed to the many business education instructors throughout the state who field tested, evaluated, and provided invaluable feedback on these materials as a part of this revision effort.

Sincere appreciation goes to Dr. John H. Lloyd, Director, Program Development Division, for his continued support, encouragement, and leadership in this revision effort.

Dr. Harmon Fowler
Project Director
Office Simulation Project

Mrs. Doris Rash-Wooten
Assistant Project Director
Office Simulation Project

INTRODUCTION

PROFFITT, DORSEY & HUFF, INC. is a position simulation. A position simulation is often referred to as the second level of office simulation--(1) task; (2) position; (3) work flow. This type of simulation contains packaged modules or tasks for a particular position. The tasks or activities are usually sequenced as they would be performed in a real work situation. There is no work flow or interrelationship between workers in the different positions.

This position simulation is designed to provide training for the student-secretary. It resembles as closely as possible a secretary's actual on-the-job experience. However, in an attempt to get away from the stereotyped term, "secretary", the position title will be "Administrative Assistant." The setting is that of an Administrative Assistant in an independent insurance agency. The tasks included in this simulation offer a variety of office experiences in which students can apply the skills they have learned.

GENERAL INFORMATION

About the Simulation

This simulation could be used in most office occupations programs. It could also be used in a block program. It would fit quite well in an office practice class, secretarial practice, or a separate course in simulation. It could be used on the postsecondary level.

The skills required for this simulation are the ability to type forty (40) words a minute from straight-copy material, the ability to operate calculating and duplicating machines, and the ability to take and transcribe shorthand dictated at eighty (80) words a minute (machine dictation may be substituted). Successful completion of Business Math I is a prerequisite. These basic skills would allow the student to move through the simulation smoothly with emphasis on skill refinement rather than on skill development.

There are twenty (20) jobs or tasks for the Administrative Assistant to perform. These activities should take the student fifty (50) or more hours to complete--depending on the student's abilities. The exact amount of time required to complete this package will vary with the individual student. Some students work much faster than others.

GENERAL INFORMATION

About the Company

PROFFITT, DORSEY & HUFF, INC. is an independent insurance agency which represents numerous insurance companies. This agency was founded in 1923 by Jonathan Andrew Huff. It has grown since that time into a well-known insurance agency. The agency was incorporated in 1951, and Jonathan Andrew Huff, II, is now serving as president of the company. The offices are located at 1257 International Boulevard, Suite 13 of the Cain Tower, Atlanta, GA 30001.

Currently employed in the company are nine (9) agents (called Sales Account Executives). The support staff consists of an Administrative Services Manager, two (2) automobile rating clerks, one (1) marketing and claims manager, one (1) receptionist/file clerk, two (2) typists, and the newly created position of Administrative Assistant to the Administrative Services Manager.

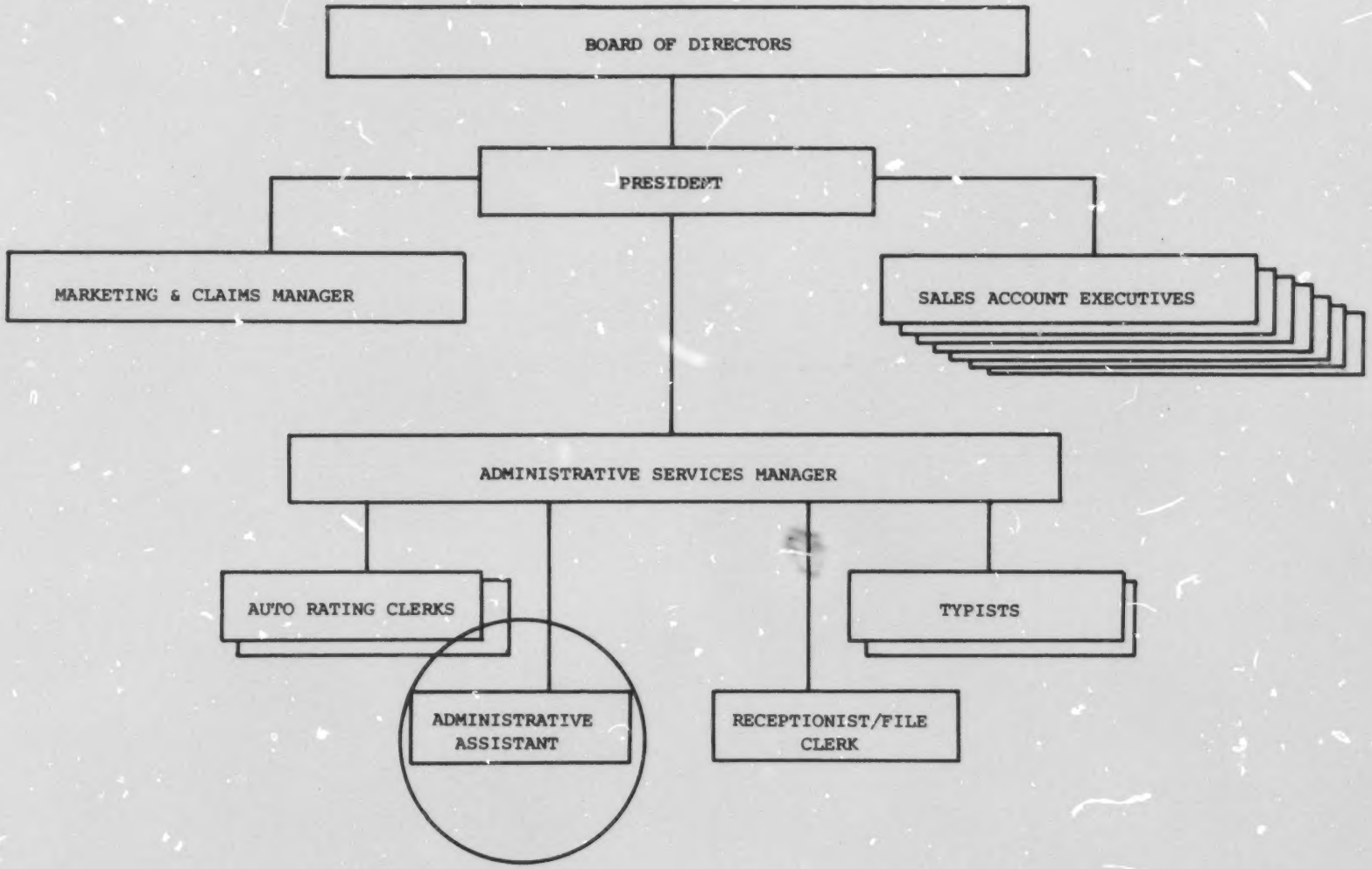
This company is both a sales and a service organization. Its purpose is to produce a profit that is sufficient to provide a fair and equitable return on the stockholders' investment. The function of the company is to provide property and casualty coverages and service to its customers. Since this agency represents several insurance companies, it is the responsibility of the Sales Account Executives to be knowledgeable of each insurance company and type of insurance in order to better serve the particular needs of the customers.

The office work consists of all the paperwork involved in providing insurance to clients, processing claims, endorsements, invoicing premiums, and dealing with the various insurance company home offices. It also includes dealing with prospective and current customers.

In 1977 the agency employed the firm, Financial Data Services, to perform all accounting functions including issuance of claims checks, receivables, payables, monthly payroll, and income tax preparation. This outstanding computer services firm has consistently performed these functions for less than one half the estimated cost of maintaining a specialized department within the agency.

PROFFITT, DORSEY, & HUFF, INC.

ORGANIZATION CHART



Position Description

POSITION: Administrative Assistant

SUPERVISOR: Administrative Services Manager, N. Lee Jordan

SUBORDINATES: None

PURPOSE: To assist the Administrative Services Manager in the writing of new business and the servicing of the existing accounts. To assist in the preparation of letters, handling of correspondence, and transcription of dictation.

PRIMARY FUNCTIONS:

(1) Assists the Administrative Services Manager in the completion of applications of new or renewal business.

(2) Reviews new and renewal policies and endorsements for accuracy as to typing, coverage, and rating.

(3) Prepares correspondence as dictated and initiates own correspondence with companies and clients.

(4) Maintains an information retrieval system.

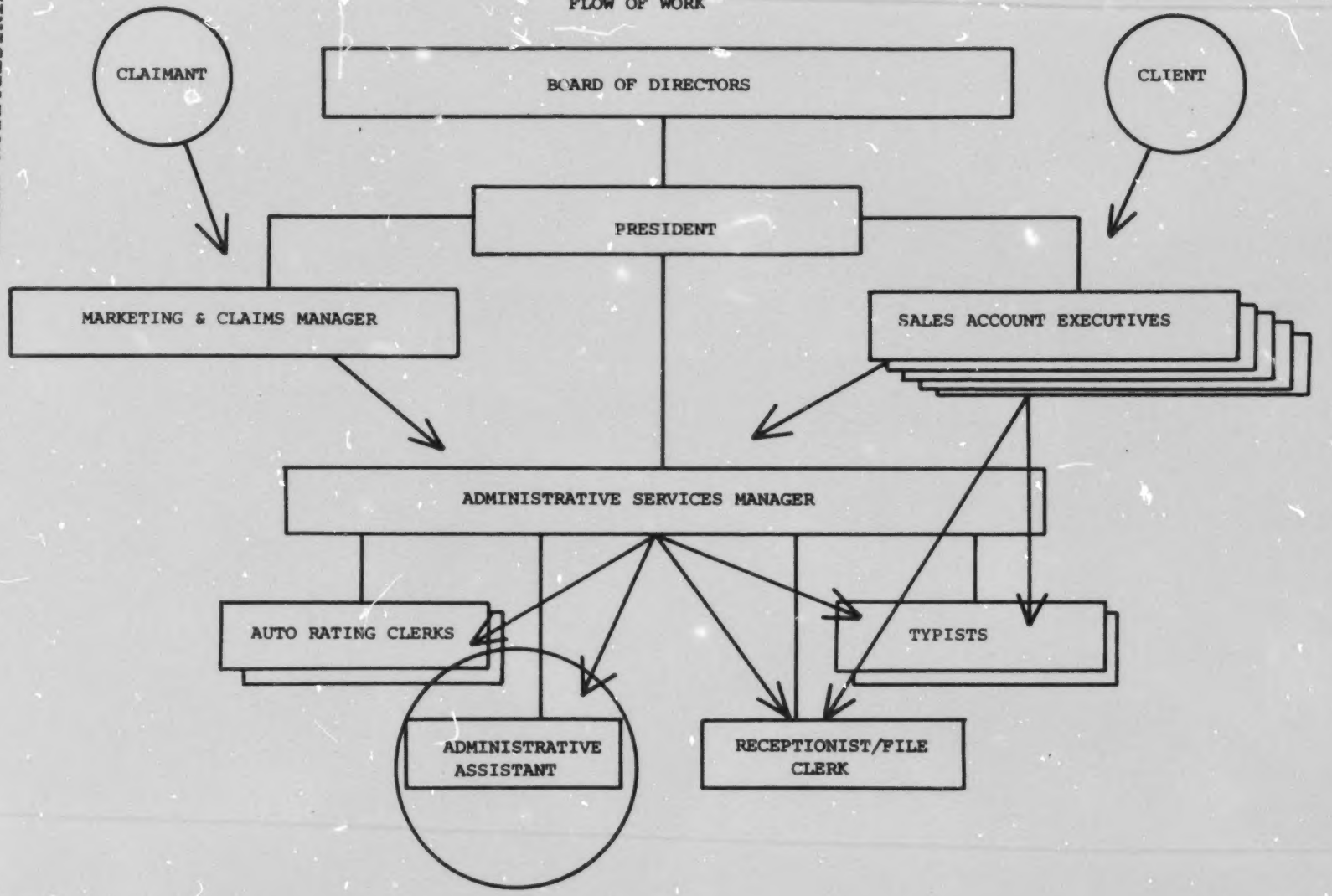
(5) Transcribes dictation for all Sales Account Executives. Dictation includes letters, memos, and forms. Also, transcribes any handwritten material. This requires a knowledge of terminology and spelling applicable to the insurance industry and use of transcribing equipment.

(6) Handles travel arrangements, itineraries, expense reports; arranges business meetings; takes minutes at meetings; drafts speeches and other general secretarial duties.

(7) Performs other routine tasks as needs arise.

PROFFITT, DORSEY, & HUFF, INC.

FLOW OF WORK



The students will need the following items in their work at Proffitt, Dorsey & Huff, Inc.

Supplies

1 typewriting eraser
1 correction tape
2 pencils
75 carbon sets
75 letterheads
75 envelopes
1 package of index cards
10 second sheets
1 note pad
All other standard office supplies

Equipment

Student desks (preferably "L" shaped)
Student chairs
Typewriters (one long carriage)
Calculators
Filing cabinet
Mimeograph process duplicator
Spirit process duplicator
Transcribers with earphones
Card file box
Telephones (desirable)

References

Dictionaries
Airline Timetables
Office Supply Catalogs
Postal Information
ZIP Code Directory
Telephone Directories
All other standard office reference manuals

Instructor's Role

An introduction and orientation to the PROFFITT, DORSEY & HUFF, INC. simulation will probably be the most successful way to begin. Meet with the entire class to introduce the company and to discuss the firm's basic activities, policies, and procedures as well as the position which is being simulated. The time needed to handle this introduction/orientation phase will vary according to class size and the general ability of the students involved.

Strive to get the students working as PD&H employees on a day-to-day basis as soon as possible. Students will learn this job by doing it--even when they make mistakes.

Introduction to the Simulation

The following information covers ways to introduce the simulation and to orient students to the firm.

The primary function of PROFFITT, DORSEY & HUFF, INC. is to sell and service all types of property and casualty insurance for individuals and businesses. This firm represents several different insurance companies and solicits business for these companies. PD&H deals with automobile coverages, homeowners' coverages, workmen's compensation, fire insurance, etc., both commercial and individual. Once a customer becomes a policy-holder, it is necessary to service this customer's account; i.e., handle any claims from the customer, provide renewal dates and premium notices, handle any changes to the policy (endorsements), or provide any assistance possible to the client. The position

of Administrative Assistant in this company assists in handling the paperwork involved in the process of performing the above described business.

The instructor portrays the role of the Administrative Services Manager as shown on the organization chart. The instructor would introduce the student to the simulation just as a new employee would be introduced to this position. It is necessary that the employee familiarize himself/herself with the Employee's Manual.

Following this orientation, the student (employee) is ready to begin his/her new position as Administrative Assistant for PROFFITT, DORSEY & HUFF, INC. Each task contained in the simulation is accompanied by detailed instructions. However, it is suggested that the instructor review these tasks prior to implementing this simulation in class.

Evaluating the students in office simulation is probably the most difficult type of evaluation with which the instructor is confronted. The instructor observes attitudes, organization, and appearance as well as work production (quality and quantity) in evaluating total student performance. A sample evaluation form is enclosed for your consideration.

Sample Employee Rating Form

Name_____ Position_____ Date_____

Rating Scale:

5 = Excellent	Work is extremely well done; does more than is expected; first in line for promotion.
4 = Very Good	Work is well done; usually puts forth more effort than is expected.
3 = Good	Does good work but does only what is required.
2 = Fair	Is careless about work at times; puts forth minimum effort.
1 = Unsatisfactory	This rating may be the result of any of the following: Poor attendance, Tardiness, Work incomplete, Work of inferior quality, Negative attitude toward work.

PRODUCTION

___Quality of Work--work is always neat; does not overlook typing errors; is accurate in calculations.

___Quantity of Work--displays efficient use of time.

___Job Knowledge--is familiar with all aspects of job; does not always depend on others to explain how to perform assigned duties.

___Judgment--has ability to make sound decisions.

___Organization--has ability to plan work; establishes priorities well.

PERSONAL QUALITIES

___Dependability--is reliable in carrying out duties.

___Cooperation--works well with other employees.

___Courtesy--shows consideration for others; is polite, displays good manners.

ATTENDANCE

___Attendance Record--is not absent frequently, and advises supervisor when absence must occur.

___Punctuality--shows up for work on time; does not take longer breaks than allowed.

ATTITUDE

___Toward Job--shows enthusiasm; does not complain often.

___Toward Other Employees--courteous and helpful; does not gossip about other employees.

___Toward Supervisor--follows supervisor's requests; is able to appreciate constructive criticism.

PERSONAL APPEARANCE

__Clothing and skin apparently clean; practices dental hygiene; nails clean; hair clean and neat; no offensive odors.

__Makeup and jewelry appropriate for the office.

WHAT MIGHT THIS EMPLOYEE DO TO IMPROVE JOB PERFORMANCE?

WHAT ARE SOME OF THE APPARENT OUTSTANDING ATTRIBUTES OF THIS EMPLOYEE?

OTHER COMMENTS:

Jobs

The following is a listing of the jobs that a student must complete in his/her position as Administrative Assistant for Proffitt, Dorsey & Huff, Inc. The jobs are numbered and arranged sequentially in the STUDENT MANUAL package. There is a total of twenty (20) jobs.

1. Employment Application and Interview
2. Employee Applicant Test
3. Establishment of Reference File
4. Preparation of Premium Notices
5. Proofreading and Retyping from Drafts
6. Composition and Preparation of Correspondence and Table
7. Editing, Correcting, and Typing Letters and Memos
8. Completion of Accident Report and Composing and Typing Letter of Transmittal
9. Dictation and Transcription of Four Letters
10. Transcription and Reproduction of Correspondence
11. Composing and Typing Letter with Carbons, Envelopes, and Carbon Copy Notations
12. Composing, Typing, and Reproducing Mailout; Composing, Typing, and Reproducing Letter; Addressing Envelopes; Inserting Correspondence
13. Preparation of Two Account Summaries
14. Editing, Retyping, and Reproducing Letter to Stockholders; Typing and Reproducing Memo to Stockholders; Supplying Omitted Zip Codes and Preparing Nine Envelopes; Inserting Correspondence
15. Transcription from Cassette - Notice of Annual Meeting and Designing Proxy Form for Printer
16. Analyzing, Establishing and Recording Transactions to Petty Cash Fund
17. Composing and Typing Follow-Up Letters
18. Resolving Personnel Problems
19. Composing and Typing Two Letters and Four Memos concerning Travel Arrangements; Completing Request for Cash Advance; Preparing and Typing Itineraries
20. Preparing and Typing Expense Reports for Five Employees

IMPORTANT NOTE TO INSTRUCTOR

In most cases, only the necessary number of copies of the form required in each student activity has been provided in the student materials. Included in this section is a master copy of each form that will be needed. It will be your responsibility as instructor to see that any additional copies are duplicated.

Listed below are the forms that can be found on the following pages:

(1) Application for Employment
(2) Premium Notice Form
(3) PDH, Inc. Letterhead
(4) Report of Accident and Claim Form
(5) Account Current Summary
(6) Petty Cash Voucher
(7) Blank Check Form
(8) Petty Cash Analysis Sheet
(9) Entertainment & Miscellaneous Expense Record
(10) Expense Report Summary
(11) Travel Expense Report (Detail of Expenses)

APPLICATION FOR EMPLOYMENT

We are an equal opportunity employer, dedicated to a policy of non-discrimination in employment on any basis including race, creed, color, age, sex, religion or national origin.

Personal Information

Date_____ Social Security Number_____

Name_____
Last First Middle

Present Address_____
Street City State Zip Code

Permanent Address_____
Street City State Zip Code

Phone Number_____ Height_____ Weight_____

If related to anyone in our employ, state name and department_____

_____

Referred By_____

Employment Desired

Position_____ Date you can start_____

Salary Desired_____ Are you employed now?_____

If so, may we inquire of your present employer?_____

Ever applied to this company before?_____ Where_____ When_____

Education

	Name and Location of School	Years Attended	Date Graduated	Subjects Studies
Grammar School				
High School				
College				
Trade, Business or Other Type School				

Subjects of Special Study or Research Work _____

What foreign languages do you speak fluently? _____
Read _____ Write _____

Activities other than Religious (Civic, Athletic, etc.) _____

_____

(Omit organizations, the name or character of which indicates the race, creed, color, or national origin of its members.)

Former Employers

List Below Four (4) Employers, start with the last one first.

Date Month and Year	Name and Address of Employer	Salary	Position	Reason for Leaving
From				
To				
From				
To				
From				
To				
From				
To				

References

List Three (3) persons. unrelated, that you have known one (1) year.

Name	Address	Business	Years Acquainted
1			
2			
3			

Physical Record

List any physical defects_____

Were you ever injured?_____

Have you any defects in hearing?_____ In vision?_____
In speech?_____

In Case of Emergency notify_____

I authorize investigation of all statements contained in this application. I understand that misrepresentation or omission of facts called for is cause for dismissal. Further, I understand and agree that my employment is for no definite period and may, regardless of the date of payment of my wages and salary, be terminated at any time without any previous notice.

Date _____ Signature _____

DO NOT WRITE BELOW THIS LINE

Interviewed by_____ Date_____

Remarks _____

Neatness	Character
Personality	Ability

Hired___ For Dept.___ Position_____ Will Report___ Salary (Wages)_____

Approved: 1._____ 2._____ 3._____
Employment Manager Department Head General Manager

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Billing Date	Policy No.	Company	Effective Date	Expiration Date

Coverage and Amount	Premium

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

REPORT OF ACCIDENT AND CLAIM

For Office Use Only
Claim No.

Date of Accident_____19__ Time_____A.M. P.M. Dark___ Light___

Place of Accident_____
Street City State

YOUR CAR Year_____Make_____Body Style_____Lic. No._____

Owned By_____Address_____
Street City State

Driven By_____Address_____
Street City State

Driver's Age_____Was Driver on Any Mission for Owner of Car? Yes__No__ If Yes, Explain_____

Kind of Insurance Carried-Liab. ___Med. Pay___Comp.___Coll. Amount of Deductible_____

Policy No._____ Name of Insurance Co._____ Name of Agent_____

Has Accident Been Reported to Your Company __Yes __No Where May Car Be Seen?_____

Has Any Part of Your Damage Been Paid By Your Company __Yes __No Amount___

NAMES AND ADDRESSES OF PASSENGERS IN YOUR CAR AND APPROXIMATE AGES

Names	Addresses			Ages
	Street	City	State	
	Street	City	State	
	Street	City	State	

OTHER CAR Make_____Body Style_____Lic. No._____

Owned By_____Address_____
Street City State

Driven By_____Address_____
Street City State

THE ACCIDENT Were Police There? __Yes__No From What Station?_____

Officer's Badge No._____(Name, If Known)_____

Names and Addresses of All Other Witnesses:

Names	Addresses
_____	_____
_____	_____

Was Anyone Injured in Your Car? __Yes__No If So, Who?_____

Was Anyone Injured in Other Car?__Yes__No If So, Who?_____

Describe Injuries_____

Name of Attending Dr_____Address_____

Street Name & Direction You Were Traveling_____Speed____

Street Name & Direction Other Car Traveling_____Speed____

What Traffic Control Was There?_____

What Were Weather Conditions?_____Condition of Pavement_____

What Attracted Your Attention to Other Car?_____

How Far from Intersection Were You? _____Other Car?_____

Was Speed of Your Car Reduced?____Increased?____Other Car Reduced?_____
Increased?_____

Did You See Other Car Prior to Impact?__Yes__No Did You Sound Horn?__Yes__No
Did Other Car?__Yes__No

What Signal Did You Give?_____Other Car?_____

Any Skid Marks Made by Your Car?__Yes__No Length____Other Car?__Yes__No
Length_____

What Part of Your Car Was Damaged?_____

Estimated Cost of Repairs $_____Who Made the Estimate?_____

Have Repairs Been Made? __Yes__No What Part of Other Car Damaged?_____

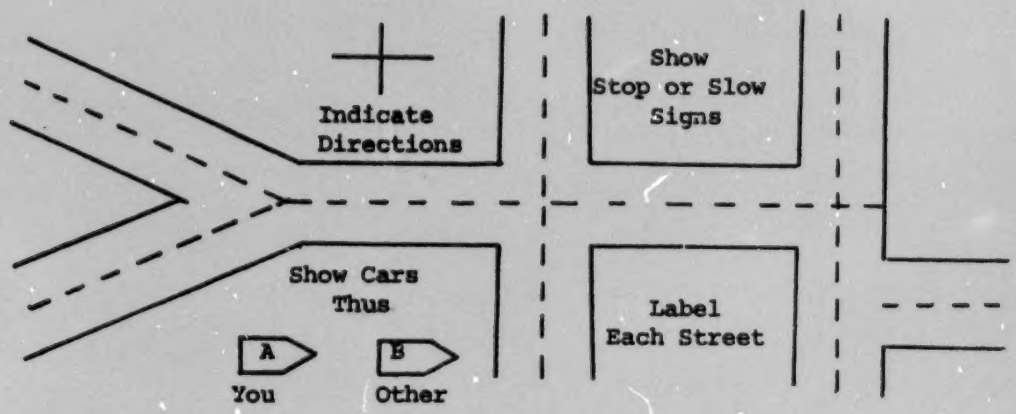
Were All Your Lights On?__Yes__No Other Car?__Yes__No Was Place of Accident Well Lighted?__Yes__No

What Statements Were Made by You or Other Party about Accident After It Occurred?_____

_____

PLEASE COMPLETE DIAGRAM

Illustrate position of cars at time of collision. Show skid marks.



State Briefly How Accident Happened_____

_____

_____

_____

Are You Making Claim for Damages on Account of the Accident?__Yes__No

If Yes, Against Whom?_____In What Amount?_____

I Hereby Declare That The Facts Stated In This Report Are True.

Signed_____Date_____19____

Address_____
Street City State

Residence Telephone_____Business Telephone_____

Occupation_____

Witness' Signature_____

Address_____

ACCOUNT CURRENT SUMMARY

AGENCY _____ AGENT _____

COMPANY _____ MONTH OF _____

INSURANCE WRITTEN	PREMIUMS			COMMISSIONS		BALANCE DUE COMPANY
	GROSS PREMIUMS	RETURN PREMIUMS	NET PREMIUMS	%	NET COMMISSIONS	
TOTALS						

No. _____ Amount $ _____

RECEIVED OF PETTY CASH

_____ 19___

For _____

Charge to _____

_____

_____

Approved by Received by

No. _____ Amount $ _____

RECEIVED OF PETTY CASH

_____ 19___

For _____

Charge to _____

_____

_____

Approved by Received by

No. _____ Amount $ _____

RECEIVED OF PETTY CASH

_____ 19___

For _____

Charge to _____

_____

_____

Approved by Received by

No.____

_____ 19___

Pay To The
Order Of_____ $_____

_____ Dollars

_____

No. ____

_____ 19___

Pay To The
Order Of_____ $_____

_____ Dollars

_____

PETTY CASH ANALYSIS SHEET FOR MONTH OF _____ 19___ PAGE ____

DATE	VOU. NO.	EXPLANATION	RECEIPTS	PAYMENTS	DISTRIBUTION OF PAYMENTS					
					ADVER. EXP. DR. 513	OFFICE SUPPL. DR. 521	POSTAGE DR. 522	MISC. EXP. DR. 522	SUNDRY DEBITS acct. no.	SUNDRY DEBITS AMOUNT

ENTERTAINMENT & MISCELLANEOUS EXPENSE RECORD

Date	Place	Misc. - Explain expense Entertainment - List guests & affiliation & Business purpose	Total expended
		Total for Period	

EXPENSE REPORT SUMMARY

Name _____

Branch _____

T & E Account No. _____ Period Ending _____ 19 _____

	Due Co.	Due Me
LAST MONTH'S CLOSING BALANCE		
ERROR CORRECTIONS - USE THIS LINE ONLY WHEN NOTIFIED		
CASH ADVANCES DATE		
"		
"		
"		
MONTH'S EXPENSES		
TOTAL EACH COLUMN		
INSERT DIFFERENCE BETWEEN TOTALS ABOVE INTO PROPER BOX	Due Co.	Due Me
CLOSING BALANCE		
AUDIT CORRECTION (ACCOUNTING USE ONLY)		
__CHECK HERE IF REMITTANCE IS ENCLOSED		

DETAIL OF EXPENSES

DATE	Travel From	Travel To	TRANSPORTATION: Auto Mileage	Tolls & Parking	Local Trans. Car Rental	Plane	Train	LIVING EXPENSE: Hotel	Meals	Entertainment	Phone Telegr. Postage	DAILY TOTALS: Meetings Etc.	Misc.
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
TOTALS FOR PERIOD	TOTAL MILEAGE												
	Mileage	___ x ___ ¢ /mile											
	Mileage	___ x ___ ¢/ mile											
												GRAND TOTAL	

ANSWER KEYS

(Jobs 1 - 20)

JOB NO. 1

DESCRIPTION OF JOB: (1) typed employment application - 50 points
(2) live interview - 50 points

INSTRUCTOR EVALUATION:

(1) Check the employment application for accuracy and neatness. You may use some of this information when conducting your live interview with the applicant.

(2) Some helpful hints in conducting an interview are: A good interview is about 90% listening and 10% talking on your part. The only way this can be achieved is to phrase your questions in such a way that there is no "yes" or "no" answers.

Example:
a. Tell me about your last job.
b. What did you like best in your last job? Why?
c. What did you like least? Why?
d. What kind of job position do you like best? Why?
e. If time breaks between jobs, why?
f. Tell me about your school subjects and activities.
g. Transportation problems?
h. Attendance record - work and school?
i. Tardiness - work and school?

These are sample "knock out" questions. They should be included in all your interviews. Too many poorly worded or negative answers should be a clue to a possible misfit. After you have thoroughly quizzed the applicant and are satisfied with the answers, you should give the prospective employee some details of the position, outlining immediate and potential duties. Then encourage the applicant to ask questions about the position.

During the interview, you should observe the applicant's appearance, visualizing the effect the applicant will have on the visitors to your office. This observation involves clothes, hair, teeth, complexion, fingernails, excessive use of makeup and perfume. It should be noted whether or not deodorants are used and if the applicant has any annoying mannerisms. An applicant who smokes or requests permission to smoke during an interview is entirely out of place. The quality of the applicant's voice should be listened to carefully to determine if it will be a pleasing one to customers; and by all means the applicant should be observed for politeness, friendliness, and good manners.

JOB NO. 2

DESCRIPTION OF JOB: Complete test - "Insurance Agency Employee Applicant Test"

INSTRUCTOR EVALUATION:

The test is not a timed test, but two hours should be sufficient to complete it. Some students may take slightly longer and some less time.

The test has "weighted" scores - some parts of it counting more than others.

The attached sheets are the KEYS to the test and the scoring instructions.

Name_____ Testing Date_____

SCORING SHEET

Test	Number of Errors	Times Weight	Total
1. Manufacturers' Products	_____	x1	_____
2. Comparisons (filing neatness)	_____	x2	_____
3. Arithmetic	_____	x5	_____
4. Spelling Detection	_____	x2	_____
5. Vocabulary	_____	x2	_____
6. Math Table Checking	_____	x5	_____
7. Spelling	_____	x2	_____
8. Grammar	_____	x3	_____
9. Practical Mathematics	_____	x5	_____
(NOTE: Ommissions count as errors)		TOTAL	_____

Grading Scale - Tests 1-9

80 and below - Excellent
81 - 120 - Good
121 - 150 - Fair
151 - 180 - Questionable
181 and over - Unsatisfactory

Test 10

(a) Was the letter considered "Mailable"? _____

(b) Typing Ability _____

IDEAL SCORE

Here are the ideal scores. Into which range does your applicant fall?

TEST	Excellent	Good	Fair
1	2	3	4
2	6	8	10
3	5	10	15
4	10	20	24
5	10	16	22
6	5	10	15
7	6	10	12
8	9	15	18
9	10	15	20
Totals:	63	107	140

TEST ONE - List of Manufacturers

List A:	List B:
12	6
9	11
10	4
11	1
8	12
2	3
1	2
3	5
4	10
7	7
5	9
6	8

TEST TWO - Comparisons

John Blassingham
Charles Beardslee
714917
Petropalm & Son, Inc.
Higgin Mfg. Co.
147519
Reinhard Brothers Co.
Robert Courtney
R.C.A. Victor Company
Oriza Ann Legrand
719417
Collum & Ackerman
Collette Cartier
Weibusch & Helger

A. B. Hinds Co.
J. Bauer & Black
W. E. Davanport
1475819
Winstar, W. B.
W. Lentingworth
Tung Sol Lamp
Theo Audel & Co.
627382?1527
A. Cedarstrand
Kircsh Mfg. Co.

TEST THREE - Arithmetic

(1) 86
(2) 304
(3) 27
(4) 1/4
(5) $7.50
(6) 15,496
(7) 498.4
(8) 54.33
(9) 1392.0
(10) 1,670,791
(11) 3,192,804
(12) 560.02
(13) 1,384.074
(14) $220.00
(15) 131.04

TEST FOUR - Detection

possibility	description
generally	assistance
noticeable	completely
temporary	appreciate
realized	sufficient
all right	recommend
advisable	miscellaneous
correspondence	changeable
management	appropriate
license	tendency
definitely	transferred
eligible	available
apologize	occasionally
maintenance	supervisory
development	unusually
efficiency	customary
doubtful	necessary
predictable	discussion
fulfill	scholastic
separate	familiar
receiving	acknowledge
especially	requirement
decision	beginning
occasion	assignment
permanent	embarrassment

TEST FIVE - Vocabulary

opposite	same	opposite	opposite	opposite
opposite	same	same	same	same
same	same	same	same	opposite
opposite	opposite	same	same	opposite
opposite	opposite	opposite	same	same
same	same	opposite	opposite	same
same	same	same	same	opposite
same	same	same	same	same
same	opposite	same	same	same
opposite	opposite	opposite	opposite	opposite

TEST SIX - Table Checking

Table One - 6
Table Two - 5
Table Three - 8
Table Four - Correct
Table Five - 5
Table Six - Correct
Table Seven - 35
Table Eight - 1
Table Nine - 6
Table Ten - 16
Table Eleven - Correct
Table Twelve - 6

TEST SEVEN - Spelling

1. athletic
2. Correct
3. recommendations
4. Mortgages
5. decided
6. committee
7. acquainted
8. Correct
9. bankruptcy
10. conceivable
11. interrupted
12. definitely
13. Correct
14. apologized
15. believe
16. privileges
17. equipped
18. Correct
19. governments
20. maintenance
21. nuisance
22. develop
23. accommodate
24. occasion
25. omitted

TEST EIGHT - Grammar

(me) I
(raise) rise
(these) this
(are) is
(hung) hanged
(who) whom
Correct
(was) were
(whom) who
(can't) can
(I) me
(differently) different
Correct
(or) nor
(phenomena) phenomenon
(have) has
(couldn't) could
Correct
(who) whom
Correct
(seem) seems
(whom) who
(is) are
(has) have
(were) was

TEST NINE - Practical Mathematics

(1) $2.77
(2) .25
(3) 140
(4) $90.80
(5) .125
(6) 1600
(7) $9.60
(8) .4
(9) $21,000
(10) 294 feet, $72.00
(11) five feet
(12) 3/4
(13) 20%
(14) $75.60, $123.20
(15) 1/2

TEST TEN - Letter and Memorandum

(Note) - It is assumed that both the letter and memorandum are typed on letterhead stationery. Answers will vary.

LETTER

(Current Date)

Mr. William E. Smalley
P. O. Box 131
Station K
Atlanta, GA 30145

Dear Mr. Smalley:

Thank you for your letter of May 16 in which you give us additional information about your accident. Thank you also for returning the statement about the extent of your injuries.

I am sorry to report that we shall have to decline your claim for benefits. Your policy contains no provisions for benefits if you are partially disabled. On the basis of the information contained in your statement and in your letter, we believe that your disability will be only temporary and that eventually you will recover completely from your injuries.

If there are any questions we can answer for you regarding your policy, please let us know. We shall be glad to ask one of our representatives to see you at your convenience.

Sincerely yours,

John H. Smith
Agent

ss

TEST TEN - Letter and Memorandum
(Continued)

(Current Date)

M E M O R A N D U M

TO: Staff

FROM: John H. Smith, Agent

SUBJECT: Parking

As you have noted for the past several weeks, there has been some difficulty in the parking situation around our office building. As of today (date), I have made arrangements with the owner of the office building next door to allow us to park in his parking lot for the same price that his employees pay - $5 per week.

Please feel free to use his parking facilities if the need should arise.

JHS/xx

JOB NO. 3

DESCRIPTION OF JOB:
(1) Alphabetizing - 25 points
(2) Format - 25 points
(3) Zip Codes - 25 points
(4) Typing - 25 points

The cards should have been arranged in the following order:

Baker, W. P.
Becker, Robert
Cason, William
Chadwick, Cecil
Disharron, Elmer
Hirsh, Marvin (Sr.)
Hirsh, Marvin W.
Johnson, Mary
Johnson & Montgomery, Inc.
Jones, Sam
Kilgore, Johnny
Matthews, J. R.
Mobley, Michael
Mobley, Sarah
Morris, Mary
Morton, Elizabeth
Pemberton, Gerald, III
Riemenschneider, Charles
Robertson, John W.
Robinson, Frank A.
Simms, Shelton (Jr.)
Viehmeyer, Gregg
Williams, C. Douglas (Jr.)
Yeomans, W. L.

Listed below is the correct information and Zip Codes that should go on the cards. The format may differ as the format was student judgment.

1 - Baker, W. P.
135 Trinity Place
Decatur, GA 30030

Policy No. 35142
Company - Travelers
Renewal Date - 04/05
Premium Amount - $554/yr.
Paid - Annually

2 - Becker, Robert
339 Hawkins Street, S. W.
Marietta, GA 30060

Policy No. 243915
Company - Reliance
Renewal Date - 10/21
Premium Amount - $341/yr.
Paid - Semi-annually

3 - Cason, William
4101 Barr Circle
Tucker, GA 30084

Policy No. WF1395
Company - Safeco
Renewal Date - 09/30
Premium Amount - $993/yr.
Paid - Semi-annually

4 - Chadwick, Cecil
730 Piedmont Avenue, N. E.
Atlanta, GA 30308

Policy No. 193151
Company - Hartford
Renewal Date - 9/16
Premium Amount - $993/yr.
Paid - Quarterly

5 - Disharoon, Elmer
2285 Northlake Parkway
Tucker, GA 30084

Policy No. 29781
Company - Safeco
Renewal Date - 12/13
Premium Amount - $560/yr.
Paid - Semi-annually

6 - Hirsh, Marvin (Sr.)
2143 Marann Drive, N. E.
Atlanta, GA 30345

Policy No. 97153
Company - Continental
Renewal Date - 3/25
Premium Amount - $249/yr.
Paid - Annually

7 - Hirsh, Marvin W.
2301 North Decatur Road, N. E.
Atlanta, GA 30307

Policy No. 254618
Company - Reliance
Renewal Date - 8/29
Premium Amount - $835/yr.
Paid - Quarterly

8 - Johnson, Mary
29 Fontaine Park
Decatur, GA 30032

Policy No. 176513
Company - Hartford
Renewal Date - 11/13
Premium Amount - $495/yr.
Paid - Semi-annually

9 - Johnson & Montgomery, Incorporated
620 Peachtree Street, N. E.
Atlanta, GA 30308

Policy No. 25631
Company - Safeco
Renewal Date - 3/5
Premium Amount - $380/yr.
Paid - Annually

10 - Jones, Sam
293 Meadowcliff Drive
Atlanta, GA 30345

Policy No. 125315
Company - Hartford
Renewal Date - 03/06
Premium Amount $335/yr.
Paid - Semi-annually

11 - Kilgore, Johnny
5991 Pisgah Road
Mableton, GA 30059

Policy No. 96291
Company - Continental
Renewal Date - 10/31
Premium Amount - $693/yr.
Paid - Quarterly

12 - Matthews, J. R.
3610 North Druid Hills Road, N. E.
Atlanta, GA 30329

Policy No. 36431
Company - Travelers
Renewal Date - 9/14
Premium Amount - $365/yr.
Paid - Semi-annually

13 - Mobley, Michael
315 Stone Mill Court
Stone Mountain, GA 30083

Policy No. 95136
Company - Continental
Renewal Date - 1/1
Premium Amount - $643/yr.
Paid - Quarterly

14 - Mobley, Sarah
6768 Flint Place
Jonesboro, GA 30236

Policy No. 139317
Company - Hartford
Renewal Date - 2/22
Premium Amount - $195/yr.
Paid - Annually

15 - Morris, Mary
110 Willowick Drive
Decatur, GA 30038

Policy No. 28613
Company - Safeco
Renewal Date - 7/19
Premium Amount - $96/yr.
Paid - Annually

16 - Morton, Elizabeth
727 Marosgo Drive, N. E.
Atlanta, GA 30324

Policy No. 95167
Company - Continental
Renewal Date - 4/24
Premium Amount - $221/yr.
Paid - Annually

17 - Pemberton, Gerald (III)
104 Lakeshore Drive
Conyers, GA 30207

Policy No. 159314
Company - Hartford
Renewal Date - 5/1
Premium Amount - $450/yr.
Paid - Semi-annually

18 - Riemenschneider, Charles
882 Gatehse Drive
Decatur, GA 30032

Policy No. 51394
Company - Safeco
Renewal Date - 2/16
Premium Amount - $535/yr.
Paid - Annually

19 - Robertson, John W.
1077 Curtis Drive
Forest Park, GA 30050

Policy No. 95301
Company - Continental
Renewal Date - 12/21
Premium Amount - $421/6 mos.
Paid - Semi-annually

20 - Robinson, Frank A.
2716 Beacon Drive
Doraville, GA 30040

Policy No. 239510
Company - Reliance
Renewal Date - 7/23
Premium Amount - $1,651/yr.
Paid - Quarterly

21 - Simms, Shelton (Jr.)
3478 Wood Valley Drive
East Point, GA 30349

Policy No. 98139
Company - Continental
Renewal Date - 8/20
Premium Amount - $950/yr.
Paid - Quarterly

22 - Viehmeyer, Gregg
Plantation Road
Fairburn, GA 30213

Policy No. 26793
Company - Safeco
Renewal Date - 7/20
Premium Amount - $945/yr.
Paid - Quarterly

23 - Williams, C. Douglas (Jr.)
683 Maple Lane
Lawrenceville, GA 30245

Policy No. 187132
Company - Hartford
Renewal Date - 6/20
Premium Amount - $505/yr.
Paid - Quarterly

24 - Yeomans, W. L.
1880 S. Hampton Road
College Park, GA 30022

Policy No. 96314
Company - Continental
Renewal Date - 10/15
Premium Amount - $430/yr.
Paid - Annually

JOB NO. 4

DESCRIPTION OF JOB:

(1) Determination of Policyholders Whose Premiums are Due - 25 points

(2) Determination of Premiums Amounts Due - 50 points

(3) Appearance and Accuracy of Premium Notices - 25 points

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. Robert Becker
339 Hawkins Street, S. W.
Marietta, GA 30060

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	243915	Reliance	10/21/--	10/21/--

Coverage and Amount	Premium
Semi-Annual premium for automobile insurance coverage	$170.50
Finance Charge	1.00
TOTAL AMOUNT DUE----------	$171.50

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. Johnny Kilgore
5991 Pisgah Road
Mableton, GA 30059

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	96291	Continental	10/31/--	10/31/--

Coverage and Amount	Premium
Quarterly Premium for Automobile Coverage	$173.25
Finance Charge	2.00
TOTAL AMOUNT DUE----------	$175.25

P
D
H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. Michael Mobley
1315 Stone Mill Center
Stone Mountain, GA 30083

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	95136	Continental	1/1/--	1/1/--

Coverage and Amount	Premium
Quarterly Premium for Automobile Insurance Coverage	$160.75
(due 10/1/--) Finance Charge	2.00
TOTAL AMOUNT DUE----------	$162.75

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. Frank A. Robinson
2716 Beacon Drive
Doraville, GA 30040

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	239510	Reliance	7/23/--	7/23/--

Coverage and Amount	Premium
Quarterly Premium for Automobile Insurance Coverage	$412.75
Finance Charge	2.00
TOTAL AMOUNT DUE----------	$414.75

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. Gregg Viehmeyer
Plantation Road
Fairburn, GA 30213

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	26793	SAFECO	7/20/--	7/20/--

Coverage and Amount	Premium
Quarterly Premium for Automobile Insurance Coverage	$236.25
Finance Charge	2.00
TOTAL AMOUNT DUE----------	$238.25

P
D
H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

Mr. W. L. Yecmans
1880 S. Hampton Road
College Park, GA 30022

Billing Date	Policy No.	Company	Effective Date	Expiration Date
9/3/--	96314	Continental	10/15/--	10/15/--

Coverage and Amount	Premium
Annual Premium for Automobile Insurance Coverage	$430.00

JOB NO. 5

DESCRIPTION OF JOB: (1) Proofreading - 50 points

(2) Appearance and Accuracy in Typing - 50 points

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: J. A. Huff, Jr., President

FROM: N. Lee Jordan, Administrative Services Manager

SUBJECT: Equal Employment Opportunity Policy & Guidelines

DATE: (Current)

Enclosed is the final copy of "Equal Employment Opportunity Policy & Guidelines." Proffitt, Dorsey & Huff, Inc. complies with the requirements of the Equal Employment Opportunity Act. Thanks, J. A., for assisting with this document.

In our correspondence with job applicants, we will include the following statement: "Proffitt, Dorsey & Huff, Inc. is an affirmative action/equal opportunity employer."

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Walter Bunn, Legal Advisor
First National Bank
6010 Second Avenue South
Atlanta, GA 30337

Dear Mr. Bunn:

You are welcome to compare our stated policy on affirmative action with yours. Our policy is published and distributed to our customers, employment services, and others affected.

Affirmative Action Policy

Proffitt, Dorsey & Huff, Inc. in recognition of its responsibility not only to its customers and employees but also the communities in which it operates, reaffirms its policy to hire qualified applicants and employees during their employment without regard to race, religion, color, sex, age, or national origin. In carrying out this responsibility:

1. We will recruit, hire, and promote for all job classifications without regard to race, creed, color, national origin, sex, or age, except where age or sex is a bona fide occupational qualification.

2. We will base decisions on employment solely upon an individual's qualifications for the position available.

3. We will make promotional decisions based on the individual's qualifications as related to the position for which he or she is being considered.

4. We will ensure that all other personnel actions such as compensation, benefits, transfers, layoffs, returns from layoffs, company-sponsored training, tuition assistance, social and recreational programs will be administered without regard to race, creed, color, national origin, age, or sex.

In order for Proffitt, Dorsey & Huff, Inc. to actively fulfill this policy, we require all customers and employment services to comply with this policy in their association with Proffitt, Dorsey & Huff, Inc.

Sincerely yours,

N. Lee Jordan
Administrative Services Manager

xx

Enclosures (1)

PROFFITT, DORSEY & HUFF, INC.
EQUAL EMPLOYMENT POLICY AND GUIDELINES

Proffitt, Dorsey & Huff, Inc. is committed to the principles of Equal Employment Opportunity. In order to emphasize this commitment and to express its personal concern for making equal employment opportunity within the company a reality, President J. A. Huff, Jr., issued the following general policy statement on August 31, 19--:

> "It is the policy of Proffitt, Dorsey & Huff, Inc. to provide equal opportunity in employment through the prohibition of discrimination against all applicants and employees because of age, race, color, creed or religion, sex, handicap, ancestry or national origin, and to take affirmative action to eliminate any barriers which have traditionally limited employment, compensation and advancement of women and minorities."

Recognizing that such a policy cannot become or remain a reality without an effective program, Proffitt, Dorsey & Huff, Inc. views its traditional policy of nondiscrimination as one that imposes an obligation actively to seek to increase the number of women and minority individuals employed in all job classifications within the corporation. Further, it obligates the corporation to provide and to make such persons aware of a system of equal compensation for comparable work and of equal employment opportunities for merited promotion. Affirmative action to implement this policy will be continuous and aggressive and will be based on the personal commitments of Proffitt, Dorsey & Huff, Inc. to be an Equal Employment Opportunity Affirmative Action employer.

The Administrative Services Manager works in cooperation with those having initial personnel responsibilities to:

1. Develop affirmative action programs for the employment of women and minority individuals.

2. Identify problem areas where women and minority individuals are either underutilized or absent from the work force.

3. Ensure that all personnel actions, including but not limited to, referrals, placements, transfers, promotions, terminations, and salary adjustments reflect equality of opportunity and treatment for women and minority individuals as compared with white males.

4. Develop effective systems and procedures for the continuous monitoring and evaluation of all aspects of the affirmative action programs in this country.

5. Represent this corporation in working with the District Equal Employment Opportunity Office and with state and federal compliance review teams.

JOB NO. 6

DESCRIPTION OF JOB: (1) Composition - 60 points

(2) Appearance and Accuracy - 40 points

SPECIAL NOTE: On the memorandum to employees concerning the picnic, student solutions will vary in content and in format. All information in the instructions should be mentioned.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

M E M O R A N D U M

TO: All Employees

FROM: N. Lee Jordan

SUBJECT: Company's Annual Picnic

DATE: (Current)

FOOD FUN FROLIC

Your annual picnic will be held at Big Canoe on (the fourth Saturday of this month). Come at 10:00 a.m. and plan to stay until 4:00 p.m. Please come and bring your immediate family or a friend.

This picnic is for you; therefore, would you please check your preference in the categories listed below. Be sure to fill out the form and return it to Miss Jones by (the third Monday of this month). This information is necessary to make the picnic a success. The dessert and drinks will be donated by the Do-Nut Shack.

NLJ/xx

__YES! I will attend the company's annual picnic, and I will bring __guest(s).

__No. I will not be able to attend the company's picnic.

_____
Signature

PREFERENCES:

Meats--Choose 2

__Fried Chicken
__Hamburgers
__Ham
__Barbequed Ribs

Vegetables--Choose 2

__Baked Beans
__Tomato Slices
__Congealed Salad
__Corn-on-the-Cob
__Green Beans
__Potato Salad
__Slaw

Entertainment--Choose 1

__Music __Games

NEW CLIENTS

June and July, 19--

Albritten, Arthur A.
201 Weststone Drive, S. W.
Ellijay, GA 30540

Bell, Jack T.
P. O. Box 898
Nelson, GA 30151

Berkeley, John F.
410 Monty Avenue
Talking Rock, GA 30175

Billings, Blondie
P. O. Box 796
Fairmount, GA 30139

Cameron, H. D.
Star Route
Juno, GA 30551

Cox, Fred C.
183 Rocky Road
Nelson, GA 30151

Franklin, Arnold B.
1186 Hood Road
Dawsonville, GA 30534

Friedel, Fred B.
176 Mountain View Road
Jasper, GA 30143

Friedsam, Hiram F.
P. O. Box 2169
Jasper, GA 30143

Golden, Samuel B.
220 N. Main Street
Jasper, GA 30143

Gravelley, Ulysses L.
Jones Mountain Road
Juno, GA 30551

Harpoole, Thomas B.
306 Douglas Street
Dawsonville, GA 30534

Hartley, Steve A.
Time Square
Juno, GA 30551

Hollowitz, Jennifer L.
19 West First Street
Ellijay, GA 30540

Jackson, Jacob L.
892 Spring Street
Marblehill, GA 30148

Janowski, Frank J.
232 Chargin Road
Ellijay, GA 30540

Jordan, Jeanette
Star Route
Juno, GA 30551

Lee, Movelda J.
180 Quail Street
Ellijay, GA 30540

Lindletter, L. R.
916 Travis Building
Ball Ground, GA 30107

MacLaine, Peter M.
P. O. Box 102
Dawsonville, GA 30534

Marriott, William M.
15 Olivia Avenue
Jasper, GA 30143

Norton, David N.
Cove Mountain Road
Nelson, GA 30151

Peterson, L. J.
1001 Park Central Avenue
Jasper, GA 30143

Pertrosky, Clyde M.
P. O. Box 3560
Ball Ground, GA 30107

Schmidt, Quinley B.
500 Grant Street
Ellijay, GA 30540

Stephens, Elvis J.
318 College Avenue
Ellijay, GA 30540

Washington, Clayton N.
Star Route
Holly Springs, GA 30142

Wilson, Henry B.
7296 South Main Street
Ball Ground, GA 30107

Zeno, Anne H.
264 Forest Lane
Jasper, GA 30143

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

May 23, 19--

Mr. Thomas B. Harpoole
306 Douglas Street
Dawsonville, GA 30534

Dear Mr. Harpoole:

I am sorry I was out of the office when you called the other day.

If it is convenient for you, could you please come to my office on the 28th at 3 o'clock? I will be able to talk with you about the proposed plan of group insurance which your company is planning to take. Also, I will have the preliminary figures which will include 250 employees in this blanket policy.

I will be looking forward to meeting you on the 28th.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NJL/xx

JOB NO. 7

DESCRIPTION OF JOB: (1) Editing - 60 points

(2) Appearance and Accuracy in Typing - 40 points

P D H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Randall E. Johnson
205 East 17 Street
Jasper, GA 30143

Dear Mr. Johnson:

The enclosed statement is for your Comprehensive Dwelling Policy, a three-year policy paid annually. The premium due date is the date shown on the statement.

I have reviewed your present policy coverages, Mr. Johnson; and I have no recommendation for changes that would improve the protection provided by this policy at this time. If you should have any questions concerning this insurance, please call me.

Your business with our office is appreciated. Let me know whenever I can give you any assistance or information on your insurance.

Sincerely yours,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosure

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Gary Peterson
533 Nye Street
Jasper, GA 30143

Dear Mr. Peterson:

SUBJECT: Automobile Insurance Renewal

An automobile creates a lot of risk for its owner. As you know, the driver wants complete coverage by insurance if he/she should be involved in an automobile accident.

The enclosed renewal policy provides comprehensive protection for you for another year. The policy has been checked carefully by our staff.

It is our pleasure to serve you, and as a token of our appreciation we are enclosing a key chain for your personal use.

Sincerely yours,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosures: Policy #41628
Key Chain

P D H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Miss Sally Frond

FROM: N. Lee Jordan, Administrative Services Manager

SUBJECT: Your Contribution to Proffitt, Dorsey & Huff, Inc.

DATE: (Current)

Mr. Smalley has informed me that you are an excellent worker and that you have made some time- and money-saving suggestions for our company.

I especially wish to commend you for the suggestion of using window envelopes and thus saving the time it takes to type the inside address a second time. Not only will your suggestion save time, but also it will eliminate the possibility of errors which might arise because of placing a letter in the wrong envelope.

It is a pleasure, Miss Frond, to have intelligent employees like you working for Proffitt, Dorsey & Huff, Inc.

NLJ/xx

JOB NO. 8

DESCRIPTION OF JOB:

(1) Assimilation of Information - 30 points

(2) Appearance and Accuracy of Report - 20 points

(3) Composition - 30 points

(4) Appearance and Accuracy of Letter - 20 points

proffitt, dorsey & huff, inc.

1357 International Boulevard
Suite 13 - Gain Tower
Atlanta, GA 30001
(404) 222-1133

August 22, 19--

Ms. Mary Morris
110 Willowick Drive
Decatur, GA 30038

Dear Ms. Morris:

Thank you for your letter of August 20 informing us of the details of your accident. Your letter contained all the information necessary to complete the accident report.

We were sorry to hear of your accident but extremely glad to learn that there were no injuries.

Enclosed is a copy of the report of your accident. This report was sent to SAFECO today.

Yours truly,

Administrative Services Manager

xx

Enclosure

(This letter may vary from the KEY both in content and in letter style.)

REPORT OF ACCIDENT AND CLAIM

For Office Use Only
Claim No.

Date of Accident August 18 19-- Time 6:00 (A.M. / P.M.) Dark ___ Light X

Place of Accident 15 Miles South of Seattle, Washington
Street City State

YOUR CAR Year 1978 Make Ford Body Style Torino 4-door Lic. No. GA MXG 171

Owned By Mary Morris Address 110 Willowick Dr. Decatur. GA
Street City State

Driven By -Same as above- Address -Same as above-
Street City State

Driver's Age 25 Was Driver on Any Mission for Owner of Car? Yes __ No X If Yes, Explain ___

Kind of Insurance Carried-Liab. ___ Med. Pay X Comp. ___ Coll. Amount of Deductible -0-

Policy No. 11724X3317-2 Name of Insurance Co. Safeco Name of Agent Bob Todd

Has Accident Been Reported to Your Company X Yes __ No Where May Car Be Seen? Moon's Wrecker Yd., Seattle

Has Any Part of Your Damage Been Paid By Your Company __ Yes X No Amount ___

NAMES AND ADDRESSES OF PASSENGERS IN YOUR CAR AND APPROXIMATE AGES

Names	Addresses	Ages
Mrs. Louise Clement	741 Powatan Ave. Isle of Palms, SC (Street / City / State)	40
	(Street / City / State)	
	(Street / City / State)	

*OTHER CAR Make ___ Body Style ___ Lic. No. ___

Owned By ___ Address ___
Street City State

Driven By ___ Address ___
Street City State

*SINCE NO OTHER CAR WAS INVOLVED, THIS PORTION IS NOT APPLICABLE.

THE ACCIDENT Were Police There? X Yes __ No From What Station? Hwy. Patrol

Officer's Badge No. _____ (Name, If Known) _____

Names and Addresses of All Other Witnesses:

Names	Addresses
Charles D. Davis	1751 Moreland St., Seattle, WA

Was Anyone Injured in Your Car? __ Yes X No If So, Who? _____

Was Anyone Injured in Other Car? __ Yes __ No If So, Who? N/A

Describe Injuries _____

Name of Attending Dr _____ Address _____

Street Name & Direction You Were Traveling Hwy. 174 - West Speed 50 mph

Street Name & Direction Other Car Traveling _____ Speed ____

What Traffic Control Was There? No

What Were Weather Conditions? Sun shining Condition of Pavement dry

What Attracted Your Attention to Other Car? _____

How Far from Intersection Were You? _____ Other Car? _____

Was Speed of Your Car Reduced? ____ Increased? ____ Other Car Reduced? _____ Increased? ____

Did You See Other Car Prior to Impact? __ Yes __ No Did You Sound Horn? __ Yes __ No Did Other Car? __ Yes __ No

What Signal Did You Give? _____ Other Car? _____

Any Skid Marks Made by Your Car? __ Yes __ No Length ____ Other Car? __ Yes __ No Length ____

What Part of Your Car Was Damaged? Entire right side of car and all of top.

Estimated Cost of Repairs $ Not made Who Made the Estimate? N/A

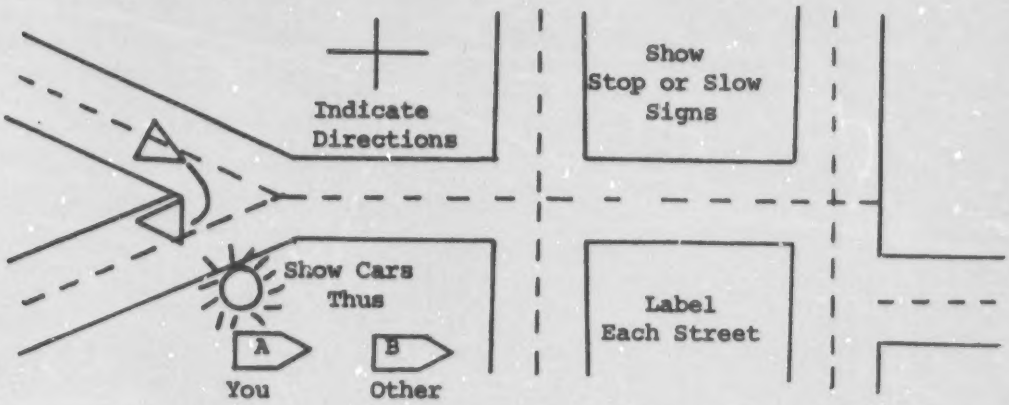
Have Repairs Been Made? __ Yes x No What Part of Other Car Damaged? _____

Were All Your Lights On? __ Yes __ No Other Car? __ Yes __ No Was Place of Accident Well Lighted? x Yes __ No

What Statements Were Made by You or Other Party about Accident After It Occurred? _____

PLEASE COMPLETE DIAGRAM

Illustrate position of cars at time of collision. Show skid marks.



State Briefly How Accident Happened The Torino was being driven West on Hwy. 174 at about 6 p.m. The sun was shining directly into driver's eyes and blinded the driver as she turned a curve. Her car went out of control and down an embankment. The car overturned.

Are You Making Claim for Damages on Account of the Accident? __Yes X No

If Yes, Against Whom?_____ In What Amount?_____

I Hereby Declare That The Facts Stated In This Report Are True.

Signed_____ Date August 22 19 --

Address 110 Willowick Drive (Street) Decatur (City) GA (State)

Residence Telephone 634-7511 Business Telephone N/A

Occupation Administrative Services Manager

Witness' Signature_____

Address_____

REPORT OF ACCIDENT AND CLAIM

For Office Use Only
Claim No.

Date of Accident_____19__ Time_____A.M. P.M. Dark___ Light___

Place of Accident_____
Street City State

YOUR CAR Year_____Make_____Body Style_____Lic. No._____

Owned By_____Address_____
Street City State

Driven By_____Address_____
Street City State

Driver's Age_____Was Driver on Any Mission for Owner of Car? Yes__No__ If Yes, Explain_____

Kind of Insurance Carried-Liab. ___Med. Pay___Comp.___Coll. Amount of Deductible_____

Policy No._____ Name of Insurance Co._____ Name of Agent_____

Has Accident Been Reported to Your Company __Yes __No Where May Car Be Seen?_____

Has Any Part of Your Damage Been Paid By Your Company __Yes __No Amount___

NAMES AND ADDRESSES OF PASSENGERS IN YOUR CAR AND APPROXIMATE AGES

Names	Addresses			Ages
	Street	City	State	
	Street	City	State	
	Street	City	State	

OTHER CAR Make_____Body Style_____Lic. No._____

Owned By_____Address_____
Street City State

Driven By_____Address_____
Street City State

THE ACCIDENT Were Police There? __Yes__No From What Station?_____

Officer's Badge No._____(Name, If Known)_____

Names and Addresses of All Other Witnesses:

Names	Addresses
_____	_____
_____	_____

Was Anyone Injured in Your Car? __Yes__No If So, Who?_____

Was Anyone Injured in Other Car?__Yes__No If So, Who?_____

Describe Injuries_____

Name of Attending Dr_____Address_____

Street Name & Direction You Were Traveling_____Speed____

Street Name & Direction Other Car Traveling_____Speed____

What Traffic Control Was There?_____

What Were Weather Conditions?_____Condition of Pavement_____

What Attracted Your Attention to Other Car?_____

How Far from Intersection Were You? _____Other Car?_____

Was Speed of Your Car Reduced?____Increased?___Other Car Reduced?____ Increased?____

Did You See Other Car Prior to Impact?__Yes__No Did You Sound Horn?__Yes__No Did Other Car?__Yes__No

What Signal Did You Give?_____Other Car?_____

Any Skid Marks Made by Your Car?__Yes__No Length___Other Car?__Yes__No Length_____

What Part of Your Car Was Damaged?_____

Estimated Cost of Repairs $_____Who Made the Estimate?_____

Have Repairs Been Made? __Yes__No What Part of Other Car Damaged?_____

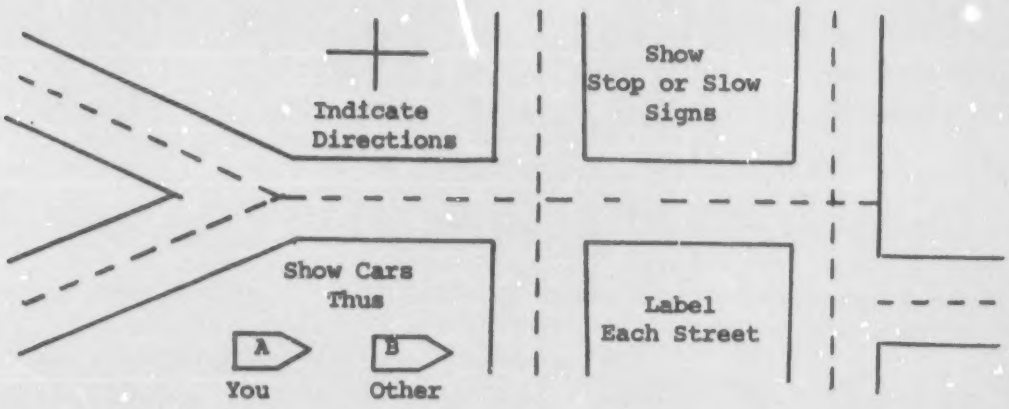
Were All Your Lights On?__Yes__No Other Car?__Yes__No Was Place of Accident Well Lighted?__Yes__No

What Statements Were Made by You or Other Party about Accident After It Occurred?_____

_____

PLEASE COMPLETE DIAGRAM

Illustrate position of cars at time of collision. Show skid marks.



State Briefly How Accident Happened_____

_____

_____

_____

Are You Making Claim for Damages on Account of the Accident? __Yes __No

If Yes, Against Whom?_____ **In What Amount?**_____

I Hereby Declare That The Facts Stated In This Report Are True.

Signed_____ **Date**_____ 19____

Address_____
Street City State

Residence Telephone_____ **Business Telephone**_____

Occupation_____

Witness' Signature_____

Address_____

JOB NO. 9

DESCRIPTION OF JOB: (1) Accuracy and Appearance of Transcription

a. Accuracy of Transcription - 40 points

b. Punctuation - 35 points

c. Format and Appearance - 25 points

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. William G. Lawrence
1199 Kildare Avenue, South
Chicago, IL 60624

Dear Mr. Lawrence:

For some time I have been trying to plan a trip so that I could visit you. After Jim Conley called on you last time, he wrote me that you are planning a new sales campaign introducing two new policies which I want to discuss with you. I shall be in your city on the 25th of this month.

Your company has certainly given us a tremendous volume of business during the ten years I have been administrative services manager. Just to satisfy my curiosity, I had someone total the volume over that period. We have appreciated this business more than I can tell you. Rest assured we shall do everything we can to work with you in any campaign you are planning.

If for any reason you cannot see me on the morning of the 25th, wire or call me at my expense; and I'll try to come at your convenience.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NJL/xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. H. D. Cameron
Star Route
Juno, GA 30551

Dear Mr. Cameron:

Your check for $193 in payment of your homeowner's insurance premium has not reached our home office. It is now one month late, and they have not received it nor have we received an explanation from you as to why it was not sent.

Because our business dealings over the years have been so pleasant, I feel certain that something has happened that accounts for your delay in meeting your obligation. No doubt we can work out something satisfactory to both of us.

Please let me hear from you immediately. The fact that our reminder has been ignored disturbs me greatly. Is it possible that you did not receive it?

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Thomas A. Clark
210 Main Street
Jasper, GA 30143

Dear Mr. Clark:

We received your letter telling us that you had an accident a few days ago while backing your car out of the driveway and that your fender was damaged.

We are sorry to learn of this accident, but we are glad to be able to tell you that the collision insurance you carry with us will take care of this damage. All you need do is get three estimates of the damage, and then we'll have the fender repaired.

As you know, your insurance policy expires in a few days. We are enclosing a new policy for the coming year.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosure

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. R. J. Cummings
P. O. Box 1892
Jasper, GA 30143

Dear Mr. Cummings:

No doubt in your home you have many valuable furnishings of which you are proud--and with justification. Would you like to know how you can increase the effective value of your insurance on these furnishings?

We not only sell insurance but also appraise people's property. This service really helps our clients by making their insurance policies mean more through accurate appraisals of their homes and their furnishings.

Let us show you how you can add fifty percent (50%) or more to the value of your insurance program. If you will return the enclosed card, a member of our staff will call on you at your convenience.

May we look forward to hearing from you soon?

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosure

JOB NO. 10

DESCRIPTION OF JOB:

(1) Accuracy and Transcription - 60 points

(2) Accuracy and Appearance of Masters - 30 points

(3) Appearance of Copies - 10 points

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

M E M O R A N D U M

TO: All Employees

FROM: N. Lee Jordan
Administrative Services Manager

SUBJECT: Controlling Long Distance Telephone Calls

DATE: (Current)

Our monthly telephone charges have become a major item in our overall expenses. The president has directed us to control these charges as much as possible.

In line with this, please adopt the following procedures:

1. Use a letter or a wire whenever possible in lieu of the long distance telephone call.

2. When a telephone call is necessary, outline the subject matter to be covered.

3. Make the conversation as brief as possible.

Since the president has taken such a firm stand on this matter, it is imperative that we comply.

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1267 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Martin Office Equipment, Inc.
710 North Avenue
Atlanta, GA (Student to look up Zip Code)

Ladies and Gentlemen:

Due to insufficient operating instructions, the Model 725 machine we purchased from you has given us some trouble.

We would appreciate the precise instructions for adjusting the controls to eliminate excessive noise when the machine is in operation.

We have also considered replacing the Model 725 with the larger Model 825. Would you please enclose price on the Model 825 together with capacity and space requirements data.

If we should decide to make the above change, when can we expect delivery on the machine?

Your prompt reply will be appreciated.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Joe Baggs
1018 Forest Avenue
Ellijay, GA (Student to look up Zip Code)

Dear Mr. Baggs:

Congratulations on your second anniversary of employment with Proffitt, Dorsey & Huff, Inc.

On June 1 you will be eligible to join the benefit plan. Some of the membership benefits are as follows:

1. The company pays the entire cost.

2. The death benefit is equal to three years' pay if death occurs before retirement.

3. Retirement income is based on years of service and average earning for the highest paid years of the last ten years of service.

To join this plan, sign all copies of the enclosed application and return them on or before June 1.

If you have any questions concerning the benefits of the plan, please call me for an appointment.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosure

(Speech to be typed on 5" x 8" cards and triple spaced in all capital letters. Titles may vary.)

SAFETY FIRST

THERE IS ONE BIG FACTOR THAT CAN QUICKLY CHANGE AN AUTOMOBILE FROM SOMETHING PLEASANT AND CONVENIENT TO A SOURCE OF UNHAPPINESS.

THAT FACTOR IS THE DRIVER.

MOST PEOPLE THINK THEY ARE SAFE DRIVERS. YET, DESPITE SAFER AND EASIER DRIVING CARS, COUNTLESS THOUSANDS OF PERSONS ARE KILLED ON THE HIGHWAYS OF THE UNITED STATES EACH YEAR. HUNDREDS ARE KILLED IN CAR ACCIDENTS OVER ANY HOLIDAY WEEKEND.

POLICE AND SAFETY AUTHORITIES SAY THAT FEW ACCIDENTS ARE CAUSED BY FAILURE OF AUTOMOBILES TO FUNCTION PROPERLY. IT IS THE DRIVER ERROR IN ALMOST ALL ACCIDENTS, AND USUALLY THERE IS SOME DEGREE OF ERROR ON THE PART OF BOTH DRIVERS INVOLVED IN THE MISHAP. SUCH ERRORS RESULTED FROM UNSAFE DRIVING HABITS.

THERE ARE THREE MAJOR CAUSES OF ALL ACCIDENTS:

1. INATTENTIVENESS - EACH PERSON SHOULD BE ON THE ALERT, ESPECIALLY AT INTERSECTIONS.

2. SPEEDING.

3. PULLING AWAY FROM THE CURVE IMPROPERLY.

ANOTHER SERIOUS CAUSE OF ACCIDENTS IS DRIVING TOO CLOSE TO THE CAR AHEAD. SAFETY MANUALS SUGGEST KEEPING ONE CAR LENGTH BEHIND THE CAR AHEAD FOR EACH TEN MILES AN HOUR OF SPEED. THE DISTANCE BETWEEN CARS SHOULD BE INCREASED IN RAIN AND ICY WEATHER.

DRIVING AN AUTOMOBILE CAN BE SAFE AND PLEASANT IF YOU, THE DRIVER, WILL EXERCISE CARE AT ALL TIMES AND PUT SAFETY FIRST.

IF PEOPLE WOULD ONLY HEED TO THIS ADVICE, THEN THERE WOULD BE LESS ACCIDENT INSURANCE CLAIMS TO BE FILED

JOB NO. 11

DESCRIPTION OF JOB: (1) Composition - 60 points

(2) Appearance and Accuracy - 40 points

SPECIAL NOTE: The key to the letter is a suggested one. The letter may vary in content and format.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Raymond T. Simmons, President
Typewriters, Inc.
697 Industrial Boulevard
Atlanta, GA 30348

Dear Mr. Simmons:

Last week, a call was made to your service department to report that we were having trouble with the automatic typewriter which you recently sold us. At that time, we asked that the repairman who came to pick up the machine should bring another typewriter for our use during the period that our machine was being repaired.

When your repairman arrived, however, he did not bring another typewriter with him but stated that he felt he would be able to adjust the machine in our office. After spending over two hours on our typewriter, he told us that the trouble was more serious than he had expected it to be. He further stated that it would be necessary for him to take the machine back to the shop where he would have the equipment necessary to repair it. The repairman promised, however, that he would return the typewriter before noon on the following day.

He did not return the typewriter, and we have called your repair department repeatedly to remind them of this promise. Each time we called, we were told that the machine would be completely finished by the following day.

It has now been over a week since we first asked about our typewriter repair. We have called another typewriter company, and they have sent over a machine that is comparable to yours. If it continues to give the excellent service it has displayed so far, we shall buy the machine.

If there is anything you can do to help us with our problem, we shall be extremely grateful.

Yours truly,

(Student's Name)
Administrative Assistant

cc: Financial Data Services

JOB NO. 12

DESCRIPTION OF JOB:

(1) Originality and Credibility of Mailout - 40 points

(2) Composition of Letter of Transmittal - 30 points

(3) Addressing Envelopes and Inserting Correspondence - 5 points

(4) Appearance and Accuracy - 20 points

(5) Reproducing Copies - 5 points

INSTRUCTOR EVALUATION: Check mailout for accuracy and give extra credit for any creativity or original thinking displayed. The attached KEY is only a suggested format, as format may differ.

The letter of transmittal may vary--it should be concise, correct, and state that the mailout is enclosed.

Check addresses on envelopes.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

We Care

WHAT LIABILITY COVERAGE DO YOU HAVE?

As one of our current automobile policyholders, we feel a responsibility to you to make sure that you understand the liability coverage you have.

You see, often an individual thinks he/she is fully covered; and when he/she has an accident and has to pay a considerable amount "out of his/her pocket", the agent usually gets the blame.

Do you understand your current liability coverage of 10/20/5--which is the minimum required by state law? As you know, liability insurance pays the "other guy" for damages resulting from an accident. A Family Automobile Policy with limits of 10/20/5, as you have, protects up to a maximum of $10,000 for the bodily injury claim of any one person, $20,000 for the total of all bodily injury claims in the accident, and $5,000 for all the property damage. The following might help you to understand this better:

10	/ 20 /	5
BODILY INJURY		PROPERTY DAMAGE
$10,000 per person		
$20,000 per person		$5,000

Should the claims amount to more than these coverages, you, as the insured, are responsible for the additional amount.

Some years ago when these minimum limits were set by law, perhaps this was adequate coverage; but today, with rising costs, particularly hospitalization, this coverage is no longer sufficient. For instance, if you have an accident and "total" the other new car, the $5,000 property damage that you now have will no longer pay for a new car. If there are four people injured in the other car, the $20,000 bodily injury per occurrence that you now have will not go very far on a hospital bill for four people.

Should you desire premium rates on increased coverage, please call us. We are in business to serve you.

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Mr. Marvin Hirsh, Sr.
2143 Marann Drive, NE
Atlanta, GA 30345

Dear Mr. Hirsh:

Please read the enclosed informaticn about the liability coverage you currently have on your automobile insurance policy with us.

We are not soliciting additional business from you, but we want to make you aware of the protection that you now have (or don't have).

Let us know if we can help you in any way.

Sincerely yours,

Lee Jordan
Administrative Services Manager

LJ/xx

Enclosure

The correct addresses on the letter and envelopes are:

Mr. Marvin Hirsh, Sr.
2143 Marann Drive, NE
Atlanta, GA 30345

Mr. Michael Mobley
315 Stone Mill Court
Stone Mountain, GA 30083

Mr. Gerald Pemberton, III
104 Lakeshore Drive
Conyers, GA 30207

Mr. W. P. Baker
135 Trinity Place
Decatur, GA 30030

Mr. Elmer Disharoon
2285 Northlake Parkway
Tucker, GA 30084

Ms. Elizabeth Morton
727 Marosgo Drive, NE
Atlanta, GA 30324

Mr. Charles Riemenschneider
882 Gatehse Drive
Decatur, GA 30032

JOB NO. 13

DESCRIPTION OF JOB:

(1) Synthesis and Categorization of Pertinent Information - 40 points

(2) Accuracy of Computations - 40 points

(3) Accuracy and Appearance of Typing - 20 points

ACCOUNT CURRENT SUMMARY

AGENCY Proffitt, Dorsey & Huff, Inc. AGENT Hoke Cain

COMPANY Jackson Life MONTH OF July

INSURANCE WRITTEN	PREMIUMS						COMMISSIONS			BALANCE DUE COMPANY	
	GROSS PREMIUMS		RETURN PREMIUMS		NET PREMIUMS		%	NET COMMISSIONS			
HO 58796	343	00			343	00	25	85	75	257	25
BT 89045	92	40			92	40	17 3/4	16	40	76	00
FI 64532	107	35			107	35	35	37	57	69	78
HF 23899	167	45			167	45	20	33	49	133	96
PL 1745	89	37			89	37	15¼	13	85	75	52
HO 98799			67	40	(67	40)	25	(16	85)	(50	55)
BT 89178	67	43			67	43	17 3/4	11	97	55	46
FC 34589	219	78			219	78	15	32	97	186	81
FI 64549	567	98			567	98	35	198	79	369	19
PL 1754	75	64			75	64	15¼	11	72	63	92
HO 98453	489	67			489	67	25	122	42	367	25
PL 1723			19	45	(19	45)	15¼	(3	01)	(16	44)
PL 1732	97	23			97	23	15¼	15	07	82	16
FI 64555	897	50			897	50	35	314	13	583	37
WC 45230	732	98			732	98	10	73	30	659	68
FC 34243	158	67			158	67	15	23	80	134	87
TOTALS	4106	45	86	85	4019	60		971	37	3048	23

ACCOUNT CURRENT SUMMARY

AGENCY Proffitt, Dorsey & Huff, Inc. AGENT Samuel Ramsey

COMPANY Big J MONTH OF July

INSURANCE WRITTEN	PREMIUMS						COMMISSIONS			BALANCE DUE COMPANY	
	GROSS PREMIUMS		RETURN PREMIUMS		NET PREMIUMS		%	NET COMMISSIONS			
FC 34879	182	50			182	50	15	27	38	155	12
HF 23176	44	80			44	80	20	8	96	35	84
WC 45890	75	00			75	00	10	7	50	67	50
HO 98790	456	90			456	90	25	114	23	342	67
FC 34935	289	56			289	56	15	43	43	246	13
WC 45892	59	42			59	42	10	5	94	53	48
FC 34652	395	41			395	41	15	59	31	336	10
HF 34880	89	60			89	60	20	17	92	71	68
BT 89130	19	95			19	95	17	3/4 3	54	16	41
FC 34675	560	89			560	89	15	84	13	476	76
BT 89023	2345	89			2345	89	17	3/4 416	40	1929	49
HO 98798	645	33			645	33	25	161	33	484	00
HF 34934	187	34			187	34	20	37	47	149	87
FC 34680	52	48			52	48	15	7	87	44	61
HO 98482	164	52			164	52	25	41	13	123	39
HF 34913			34	87	(34	87)	20	(6	97)	(27	90)
TOTALS	5569	59	34	87	5534	72		1029	57	4505	15

JOB NO. 14

DESCRIPTION OF JOB:

(1) Letter to Stockholders - 50 points

(2) Memo to Stockholders - 30 points

(3) Accuracy and Appearance of Envelopes, including Correct Zip Codes - 20 points

SPECIAL NOTE: Variations in both the letter and the memorandum are acceptable. For example, the student may choose a different letter style, may wish to type a two-page letter, or make other changes as he or she sees fit.

Zip Code for Duluth - 30316

Zip Code for Smyrna - 30080

(9 copies)

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Board of Directors

FROM: Jonathan A. Huff, II

SUBJECT: Letter to Stockholders

DATE: (Current)

Attached for your approval is the letter discussed at our last meeting. Please read this and if it meets with your approval, simply keep it for your file. Otherwise, make suggested changes and return it to me before (first day of month following). The letter is scheduled for mailing on (fifteenth day of month following).

Thank you.

xx

(9 copies) 14-3

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Dear Stockholder:

In 19--, Proffitt, Dorsey & Huff, Inc. sustained its long-term record of progress with sales and income at all-time highs. Net income for 19--, you will recall, was $95 million, or $3.03 per share compared with $89 million, or $2.83 per share in 19--an increase of 6.5%. Insurance in force shows an overall increase of 8% over 19--.

Gains were primarily due to new offerings in the form of discounts on multi-family coverage, or "Community Pooling." This concept, which originated with PD&H, Inc. in July of 19--, has gained recognition throughout the Industry. A survey of Georgia communities concluded that definite trends are identifiable insofar as claims experience is concerned in communities of comparable size, social structure, industry, economics, and other factors which were discussed with you last month.* As a result, 205 Georgia communities have to date been identified as low-risk areas, affecting rates advantageously. Our criteria resembles to some extent standard rating factors traditionally employed, with what we believe to be important exceptions. Probably the most innovative concept is the elimination of an age factor in the rating process for FAP contractors in those communities specified. We appreciate the Commission's consideration of this data and its subsequent approval for this two-year pilot project with insuring companies.

Increased sales were recorded also in the Company's Homeowners' market where our offerings continue to show strength in both traditional and new lines of coverage.

During 19--, PD&H announced new business opportunities in potential markets which represent more than one-fourth of the municipal airports in the United States. Our Administrative Services Manager and Mr. Durden are currently involved in negotiations with major insurers, and the results of these efforts are expected in the first quarter of 19--.

On March 7, 19--, the Board of Directors increased the quarterly dividend rate from 19¢ per share to 23¢ per share. This is the fourth consecutive year that the Directors have approved dividend increases.

Our goal is to continue the strong financial growth trends in the future. PD&H is well positioned to achieve continued growth through innovative marketing techniques, specialized markets, and the development of service techniques that better fulfill policyholder needs. The reported gains would not have been possible without the efforts of our employees, our stockholders, our Board of Directors, and the continuing support of our policyholders.

Thanks to each of you personally for helping us to make our motto, "Service Beyond the Contract," a reality!

Very truly yours,

Jonathan A. Huff, II
President

*Letter No. 281

JOB NO. 15

DESCRIPTION OF JOB:

(1) Transcription - 50 points

(2) Design of Proxy - 30 points

(3) Appearance and Accuracy of Typing - 20 points

Draft of Proxy Form To Be Sent To Printer

Front side should reflect the information shown below. Variations in form may be acceptable.

The Board of Directors favors a vote "FOR" proposals to:	FOR	AGAINST
1. elect four directors to serve for a term of three years.		
2. ratify the selection of McBrown & McBrown for the 19--fiscal year.		
3. approve the 19-- stock option plan.		
4. transact other business as may properly come before the meeting.		

PROXY

_____
Signature

Please sign and mail in enclosed envelope.

_____
Date

The reverse side of the proxy form should read:

PROFFITT, DORSEY & HUFF, INC.

PROXY SOLICITED BY MANAGEMENT FOR THE ANNUAL MEETING OF STOCKHOLDERS,
(indicate second Monday of ensuing month, current year)

The undersigned instructs said proxies to vote as specified upon the Items shown on the reverse of form. Unless a contrary choice is specified, this proxy will be voted "FOR" Items 1 through 4.

JOB NO. 16

DESCRIPTION OF JOB: (1) Establishment of Fund - 20 points

(2) Record Transactions - 50 points

(3) Balance and Total - 30 points

PETTY CASH UNIT

Minor payments in the office may be made through a petty cash fund. A petty cash voucher is prepared for each payment and signed by the person receiving the money. A petty cash analysis sheet is kept, with special columns set up for accounts that are used frequently. The fund is replenished periodically, with a check drawn for the amount spent.

Instructions, transactions and forms will be provided in this unit to allow the student to open and operate a petty cash system.

Transactions

May 2, 19--	(a)	Paid $.98 postage due on a shipment of policy forms from National Printing Co.
2	(b)	Purchased refreshment supplies from Food Star, $5.38.
3	(c)	Tipped delivery service, $2.00.
5	(d)	N. Proffitt withdrew $15.00 for personal use.
6	(e)	Cab fare to airport for N. Dorsey, $8.75.
7	(f)	Replenished petty cash fund.
8	(g)	Purchased book of postage stamps, $3.60.
10	(h)	Paid $10.00 to local high school for advertisement.
15	(i)	Paid $12.50 to Speedy Laundry Service for dry cleaning office drapes.
18	(j)	Purchased first aid supplies, $6.48.
20	(k)	Refreshment money placed in petty cash box, $13.45.
22	(l)	Paid C.O.D. mail delivery, $3.95.
30	(m)	Replenished Petty Cash fund to beginning month's balance.

PDH Inc.
Suite 13 - Cain Tower
Atlanta, GA 30001

No. 100

May 2 19--

Pay To The
Order Of Administrative Assistant $ 50.00

Fifty 00/100 Dollars

PCB Proposed
City Bank

J. A. Huff II

':0611'''0271': 10 14 09 1'':

PDH Inc.
Suite 13 - Cain Tower
Atlanta, GA 30001

No. 120

May 7 19--

Pay To The
Order Of Administrative Assistant $ 32.11

Thirty two 11/100 Dollars

PCB Proposed
City Bank

J. A. Huff II

':0611'''0271': 10 14 09 1'':

PETTY CASH ANALYSIS SHEET FOR MONTH OF May 19--

PAGE 2

DATE	VOU. NO.	EXPLANATION	RECEIPTS	PAYMENTS	DISTRIBUTION OF PAYMENTS: ADVER. EXP. DR. 513	OFFICE SUPPL. DR. 521	POSTAGE DR. 572	MISC. EXP. DR. 522	SUNDRY DEBITS: acct. no.	SUNDRY DEBITS: AMOUNT
19 May 2		To establish fund	5 00							
2	1	Postage due		98			98			
3	2	Refreshments/Food Star		5 38				5 38		
5	3	Tipped Delivery Ser.		2 00				2 00		
6	4	N. Proffitt-Withdrew		1 5 00					201	15 00
7	5	Cab fare - N. Dorsey		8 75				8 75		
7		Totals	5 00 00	3 2 11			98	16 13		15 00
7		Balance		1 7 98						
			5 00 00	5 00 00						
7		Balance	1 7 98							
7		To replenish fund	3 2 11							
7		Carried forward	5 00 00							
8		Postage Stamps		3 60			3 60			
10		Atlanta H.S. for ad		1 0 00	1 0 00					
15		Speedy Laundry		1 2 50				1 2 50		
18		First Aid Supplies		6 48				6 48		
20		Refreshment money box	1 8 45							
22		C.O.D. mail del.		3 95			3 95			
30		Totals	6 3 45	3 6 53	1 0 00		7 55	1 8 98		
30		Balance	3 6 55	2 6 92						
			6 3 00	5 0 00						
30		Balance	1 3 45							
30		To replenish fund								
30		Carried forward	5 00							

JOB NO. 17

DESCRIPTION OF JOB: (1) Composition - 60 points

(2) Accuracy and Appearance - 40 points

SPECIAL NOTE: The letters and memorandums given as KEYS are only possible approaches. Other approaches may be equally acceptable.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Tom Jordan

FROM: N. Lee Jordan, Administrative Services Manager

SUBJECT: Annual Sales Banquet

DATE: June 12, 19--

Tom, perhaps you have replied to my May 30 memo either by telephone or by word of mouth. However, my records do not indicate whether you will attend the banquet with a guest on July 12.

Please let us have this information right away so that the correct number may be given to the Hyatt-Regency.

Thanks.

(A SIMILAR MEMO SHOULD BE SENT TO RICHARD.)

P D H
proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Tom Jordan, Manager
Agency Department

FROM: N. Lee Jordan, Administrative Services Manager

SUBJECT: Discourtesy to Policyholders

DATE: June 12, 19--

Tom, please arrange an appointment with me as soon as possible to discuss a problem of a discourteous person employed as switchboard operator. Definite action needs to be taken immediately with regard to this employee.

This is in response to a complaint which I received this morning from our policyholder, Jon R. Bradford.

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

June 12, 19--

Mrs. Lilly L. Trulove
601 Forest Lane
Nelson, GA 30107

RE: Policy No. GS-2054-1
All-Coverage Insurance Company

Dear Mrs. Trulove:

Your accident report has not yet reached our office. This is the form which I sent with my June 7 letter. Enclosed is a duplicate form in case the original was misplaced or for some reason did not reach you.

Please complete the entire form, sign on the line indicated, and try to mail this form or bring it by our office within the next day or so. We do need to get this information to the Department of Public Safety by June 17 at the latest.

Enclosed is a self-addressed envelope. If this office can assist you in any way, please let me know.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosures

P D H
proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

June 12, 19--

Mr. Henry L. Knoctt
Vice-President
American Casualty Company
106 Bernhardt Street
Chicago, IL 60345

Dear Henry:

Regarding my request of May 30 for a quotation on the John C. Allen, II, property, I really need this quotation for study before presenting it on June 18. If I have not heard from you by June 14, I will give you a call in hopes of receiving official word by telephone.

If you should need additional information or if you foresee any problem in furnishing this quotation, please call me immediately.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

June 12, 19--

Mr. James J. Jackson
145 First Street
Acme, GA 40967

RE: Policy No. 269,803

Dear Mr. Jackson:

With our letter of May 30 we included a change of name form for you to sign before a witness in order to have Lori's name changed on this policy.

Enclosed is a duplicate form in case the original was misplaced or for some reason did not reach you. Your policy contract will be brought up to date as soon as you return this form to us.

Please contact us if you have any question or if we may be of further service.

Sincerely,

N. Lee Jordan
Administrative Services Manager

NLJ/xx

Enclosure

JOB NO. 18

DESCRIPTION OF JOB:

(1) Judgment - 60 points

(2) Application of Management Principles - 30 points

(3) Appearance and Accuracy of Memorandums - 10 points

SPECIAL NOTE: This check KEY is intended only as a basis for grading. Each memo will be different in content and form.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Thomas Wade

FROM: Administrative Assistant

SUBJECT: Telephone Abuse

DATE: (Current)

Please refer to the Proffitt, Dorsey & Huff, Inc. Employee's Manual that you were given at the time of your employment. On Page Seven you will find our office rules. I strongly suggest that you read over these rules again, especially the section on Page Ten concerning the use of the office telephone for personal calls.

As you know, the PBX Operator takes numbers for all personal calls for your convenience in returning such calls. It has been brought to my attention that you are receiving several calls per week that are not of a business nature.

Please ask your friends to refrain from calling you at work unless it is an emergency.

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: ALL PERSONNEL

FROM: Administrative Assistant

SUBJECT: Personal Hygiene

DATE: (Current)

Occasionally it becomes necessary to remind everyone how important personal hygiene is in an office. Since we work with the public, our business is often sold through first impressions and we need to make certain that the first impression everyone gets of PD&H is a good one.

Let me remind each of you to take extra care in your grooming. We must bathe daily, use deodorant, brush our teeth and use a mouthwash, change our clothing (inside and outside) every day and be sure to wear clean, neat clothing at the office. Be careful not to wear heavy perfumes or colognes since some people may be allergic to these fragrances. Also, we should shy away from the use of heavy makeup in the office.

If we do our part in the battle against body odor, our office will be a more pleasant place to work and the public will get the right first impression of us.

If you have a problem in this area and you are taking every precaution that you know of but the problem still lingers, maybe you should consider paying your doctor a visit. Very often lingering problems with a body odor are caused by a physical imbalance.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Susan Allen

FROM: Administrative Assistant

SUBJECT: Absence from Work Station

DATE: (Current)

It has been brought to my attention that you are using your work station for the wrong purpose. I am sure you were told when you were hired that you would be expected to be at your desk at all times unless you were relieved by another person. You were also told that smoking at your desk was strictly forbidden.

Please refrain from using your desk as a place to powder your nose, comb your hair, apply fresh makeup, etc. We have a very nice lounge provided for those reasons and any of our office personnel would be happy to relieve you occasionally to visit the lounge. While visiting the lounge, please don't use it for a smoking area. Smoking is not allowed in the lounge due to the number of people who object to the smoke and odor.

If these rules are asking too much of you, remember you were informed of them before you were hired. If you have any questions concerning this matter, please feel free to come by my office at your convenience. I will be happy to discuss any problem you might have.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Tim Davis

FROM: Administrative Assistant

SUBJECT: Interruptions

DATE: (Current)

Your presence here at Proffitt, Dorsey & Huff, Inc. as Office Manager has been a very pleasant one with one exception. I feel that it is in the best interest of our company, as well as your future in the business world, to bring this problem to your attention. Once you are aware of the problem, I am sure that you will make every effort to correct it.

As Office Manager, you have power over everything and everyone in the office; and all employees look up to you for help and suggestions. Your presence in our offices is always welcome, but there is a time and place for everything. Please be aware of what is going on in an office before you interrupt. It may seem like a small thing to you, but it could be very important to the people you work with. Some people work with confidential material, touchy subjects and detailed matter. To interrupt them could cause serious problems.

In the position you now hold, the worst thing that could happen to you would be that you would get a poor grade on performance. Later in your business life, it could cost you a job or the respect of your co-workers. Always remember that in any position you hold, common courtesy rules in a peaceful environment.

JOB NO. 19

DESCRIPTION OF JOB:

(1) Composition of Correspondence and Related Forms - 40 points

(2) Appearance and Accuracy of Correspondence - 20 points

(3) Appearance and Accuracy of Itineraries - 40 points

SPECIAL NOTE: This check KEY is intended only as a basis for grading. Each letter, memo and itinerary will be different in content and form.

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

(Current Date)

Delta Airlines
Hartsfield Atlanta
International Airport
Atlanta, GA 30303

Ladies and Gentlemen

Please reserve (4) round trip (coach) tickets on your scheduled flight from Atlanta to San Francisco leaving at 7:45 a.m., Monday, August 20, 19--, and returning Friday, August 24, 19--, at 10:00 a.m.

These tickets should be held at your reservations desk to be picked up by N. Lee Jordan on the day of departure. The statement for payment of these tickets can be sent to the Administrative Assistant of Proffitt, Dorsey & Huff, Inc., 1257 International Boulevard, Cain Tower, Atlanta, GA 30001.

Sincerely

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 922-1133

(Current Date)

Holiday Inn
San Francisco
Civic Center Area
San Francisco, CA

Ladies and Gentlemen:

Please secure reservations for Monday, August 20, 19--, until and including Thursday, August 24, 19--, in the following manner:

N. Lee Jordan	1 room	Single Occupancy
Stanoslov Gorka	1 room	Double Occupancy
Frank E. Soo		
Modine Jackson	1 room	Single Occupancy

The statement for payment should be itemized per room and sent to the Administrative Assistant of Proffitt, Dorsey & Huff, Inc., 1257 International Boulevard, Cain Tower, Atlanta, GA 30001. A written confirmation for these rooms will be needed as soon as possible.

Sincerely

REQUEST FOR CASH ADVANCE

Date August 12, 19--

Pay to N. Lee Jordan

Proposed Trip: From Atlanta, Georgia

To San Francisco, California

(National Insurance Underwriters Conference)

Travel and Expense Account No. 35-355 Amount $150.00

RECEIVED FROM PROFFITT, DORSEY & HUFF, INC.

The Sum of One hundred fifty Dollars and no — Cents

Signed N. Lee Jordan Date August 12, 19--

Approved by J. A. Huff, Jr. Date August 14, 19--

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: N. Lee Jordan

FROM: Administrative Assistant

SUBJECT: Travel Arrangements

DATE: (Current)

Travel arrangements for your trip to the National Insurance Underwriters Conference in San Francisco have been completed and are as follows:

Delta Airline Flight leaving Atlanta 7:30 a.m., August 20, 19--. (Tickets to be picked up at the desk by you.)

Holiday Inn of San Francisco (Civic Center Area)

Please be sure you keep a dated travel log of all expenses for your expense report form to be submitted on your return. I am enclosing a copy of the Proffitt, Dorsey & Huff, Inc. travel regulations for your convenience on this trip.

Your cash advance of $150 can be picked up from my office on Friday, August 17, 19--.

xx

Enclosure

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: S. Gorka

FROM: Administrative Assistant

SUBJECT: Travel Arrangements

DATE: (Current)

Travel arrangements for your trip to the National Insurance Underwriters Conference in San Francisco have been completed and are as follows:

Delta Airline Flight leaving Atlanta 7:30 a.m., August 20, 19--. (Tickets to be picked up at the desk by N. Lee Jordan.)

Holiday Inn of San Francisco (Civic Center Area)

Please be sure you keep a dated travel log of all expenses for your expense report form to be submitted on your return. I am enclosing a copy of the Proffitt, Dorsey & Huff, Inc. travel regulations for your convenience on this trip.

xx

Enclosure

P
D
H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: M. Jackson

FROM: Administrative Assistant

SUBJECT: Travel Arrangements

DATE: (Current)

Travel arrangements for your trip to the National Insurance Underwriters Conference in San Francisco have been completed and are as follows:

Delta Airline Flight leaving Atlanta 7:30 a.m., August 20, 19--. (Tickets to be picked up at the desk by N. Lee Jordan.)

Holiday Inn of San Francisco (Civic Center Area)

Please be sure you keep a dated travel log of all expenses for your expense report form to be submitted on your return. I am enclosing a copy of the Proffitt, Dorsey & Huff, Inc. travel regulations for your convenience on this trip.

xx

Enclosure

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: F. Soo

FROM: Administrative Assistant

SUBJECT: Travel Arrangements

DATE: (Current)

Travel arrangements for your trip to the National Insurance Underwriters Conference in San Francisco have been completed and are as follows:

Delta Airlines Flight leaving Atlanta 7:30 a.m., August 20, 19- . (Tickets to be picked up at the desk by N. Lee Jordan.)

Holiday Inn of San Francisco (Civic Center Area)

Please be sure you keep a dated travel log of all expenses for your expense report form to be submitted on your return. I am enclosing a copy of the Proffitt, Dorsey & Huff, Inc. travel regulations for your convenience on this trip.

xx

Enclosure

TRAVEL ITINERARY

N. Lee Jordan

AUGUST 20, 19--	7:45	Leave Atlanta via Delta Airlines
	9:30	Conference Registration
	12:00	Holiday Inn Room Registration
	1:30	Seminar B
AUGUST 21, 19--	7:30	Continental Breakfast
	9:30	General Assembly
	2:00	Seminar C
AUGUST 22, 19--	7:30	Continental Breakfast
	1:30	Seminar D
	7:00	Sales Awards Banquet
	9:00	Royal Ball
AUGUST 23, 19--	1:30	Speaker, "Insurance in the American Economy"
AUGUST 24, 19--	7:30	Breakfast Meeting
	10:00	Leave San Francisco via Delta Airlines

TRAVEL ITINERARY

Modine Jackson

AUGUST 20, 19--	7:45	Leave Atlanta via Delta Airlines
	9:30	Conference Registration
	12:00	Holiday Inn Room Registration
	1:30	Seminar B
AUGUST 21, 19--	7:30	Continental Breakfast
	9:30	General Assembly
	2:00	Seminar C
AUGUST 22, 19--	7:30	Continental Breakfast
	1:30	Seminar D
	7:00	Sales Awards Banquet
	9:00	Royal Ball
AUGUST 23, 19--	10:00	Seminar E
AUGUST 24, 19--	7:30	Breakfast Meeting
	10:00	Leave San Francisco via Delta Airlines

TRAVEL ITINERARY

Frank E. Soo

AUGUST 20, 19--	7:45	Leave Atlanta via Delta Airlines
	9:30	Conference Registration
AUGUST 21, 19--	7:30	Continental Breakfast
	9:30	General Assembly
	2:00	Seminar C
AUGUST 22, 19--	7:30	Continental Breakfast
	9:30	Insurance Workshop
	1:30	Seminar D
	7:00	Sales Awards Banquet
	9:00	Royal Ball
AUGUST 23, 19--	10:00	Seminar E
	1:30	Speaker, "Insurance in the American Economy"
	8:00	President's Banquet (Your sales from 1-1-xx through 6-30-xx have qualified you for this. Not Mandatory)
AUGUST 24, 19--	7:30	Breakfast Meeting
	10:00	Leave San Francisco via Delta Airlines

TRAVEL ITINERARY

Stanoslov Gorka

AUGUST 20, 19--	7:45	Leave Atlanta via Delta Airlines
	9:30	Conference Registration
	9:45	Seminar A
	12:00	Holiday Inn Room Registration
AUGUST 21, 19--	7:30	Continental Breakfast
	9:30	General Assembly
	12:15	Luncheon
AUGUST 22, 19--	7:30	Continental Breakfast
	9:30	Insurance Workshop
	1:30	Seminar D
	7:00	Sales Awards Banquet
	9:00	Royal Ball
AUGUST 23, 19--	10:00	Seminar E
AUGUST 24, 19--	7:30	Breakfast Meeting
	10:00	Leave San Francisco via Delta Airlines

JOB NO. 20

DESCRIPTION OF JOB: (1) Accuracy of Reports - 70 points

(2) Appearance of Reports - 30 points

SPECIAL NOTE: This check KEY is intended as a basis for grading only. Each memo and expense form will be different in content and form.

ENTERTAINMENT & MISCELLANEOUS EXPENSE RECORD

Date	Place	Misc. - Explain expense Entertainment - List guests & affiliation & Business purpose	Total expended
8-20	Scopios	George Parker (New insurance client)	27 70
8-21	Redwood Forest	Adam Wayne (prospective client)	67 30
8-23	Sears	David Groh, Elisha Cain, H.J. King,	
		Roger Free (Potential clients)	35 00
8-24	Sears	George Parker + Adam Wayne	17 50
		(closing deal)	
		Total for Period	147 50

20-2

EXPENSE REPORT SUMMARY

Name N. Lee Jordan

Branch Administrative Services Manager

T & E Account No. _____ Period Ending 8-24 19--

	Due Co.	Due Me
LAST MONTH'S CLOSING BALANCE		
ERROR CORRECTIONS - USE THIS LINE ONLY WHEN NOTIFIED		
CASH ADVANCES DATE	150 00	
"		
"		
"		
MONTH'S EXPENSES		147 50
TOTAL EACH COLUMN	150 00	147 50
INSERT DIFFERENCE BETWEEN TOTALS ABOVE INTO PROPER BOX	Due Co.	Due Me
CLOSING BALANCE	2 50	

AUDIT CORRECTION (ACCOUNTING USE ONLY)

__ CHECK HERE IF REMITTANCE IS ENCLOSED

DETAIL OF EXPENSES

DATE	Travel From	Travel To	TRANSPORTATION: Auto Mileage	Tolls & Parking	Local Trans. Car Rental	Plane	Train	LIVING EXPENSE: Hotel	Meals	Entertainment	Phone Telegr. Postage	DAILY TOTALS: Meetings Etc.	Misc.
16	Atlanta	San Francisco				275 60							
17	Conf. Registration											10 00	
18	Holiday Inn							45 00					
19	Meals (Day 1)								8 10				
20	Holiday Inn							45 00					
21	Meals (Day 2)								12 90				
22	Cab fare				3 25								
23	Holiday Inn							45 00					
24	Meals (Day 3)								11 45				
25	Cab fare				3 50								
26	Holiday Inn							45 00					
27	Meals (Day 4)								17 55				
28	Cab fare				5 00								
29	Cab fare to airport				2 20								
30													
31													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15					13 95	275 60		225 00	50 00			10 00	
TOTALS FOR PERIOD	TOTAL MILEAGE												574 55
	Mileage	___ x ___ ¢ / mile										GRAND TOTAL	
	Mileage	___ x ___ ¢ / mile											

M. Jackson

airfare and hotel accommodations paid by company directly to Delta and Holiday Inn. Balance to be refunded $73.95

DETAIL OF EXPENSES

DATE	Travel From / To	TRANSPORTATION: Auto Mileage	Tolls & Parking	Local Trans. Car Rental	Plane	Train	LIVING EXPENSE: Hotel	Meals	Entertainment	Phone Telegr. Postage	DAILY TOTALS: Meetings Etc.	Misc.
16	Atlanta - San Francisco				275 60							
17	Conf. Registration										10 00	
18	Holiday Inn						27 50					
19	Meals (Day 1)							17 55				
20	Holiday Inn						27 50					
21	Meals (Day 2)							14 50				
22	Cab fare			3 25								
23	Holiday Inn						27 50					
24	Meals (Day 3)							12 45				
25	Cab fare			3 50								
26	Holiday Inn						27 50					
27	Meals (Day 4)							17 55				
28	Cab fare			5 00								
29	Cab fare to airport			2 30								
30												
31												
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15				13 75	275 60		110 00	62 05			10 00	

TOTALS FOR PERIOD	TOTAL MILEAGE			
	Mileage	x	¢ /mile	
	Mileage	x	¢/ mile	

GRAND TOTAL 471 60

S. Gerka

Airfare and hotel accommodations paid by company directly to Delta and Holiday Inn. Balance due to be refunded $86.00.

BEST COPY AVAILABLE

DETAIL OF EXPENSES

DATE	Travel From	Travel To	TRANSPORTATION: Auto Mileage	Tolls & Parking	Local Trans. Car Rental	Plane	Train	LIVING EXPENSE: Hotel	Meals	Entertainment	Phone Telegr. Postage	DAILY TOTALS: Meetings Etc.	Misc.
16	Atlanta	San Francisco				275 60							
17	Conf. Registration											10 00	
18	Holiday Inn							27 50					
19	Meals (Day 1)								11 00				
20	Holiday Inn							27 50					
21	Meals (Day 2)								7 50				
22	Holiday Inn							27 50					
23	Meals (Day 3)								8 20				
24	Cab fare				3 50								
25	Holiday Inn							27 50					
26	Meals (Day 4)								7 45				
27	Cab fare to Airport				2 20								
28													
29													
30													
31													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15					5 70	275 60		110 00	34 15			10 00	
TOTALS FOR PERIOD	TOTAL MILEAGE												4 35
	Mileage	___ x ___ ¢ / mile										GRAND TOTAL	
	Mileage	___ x ___ ¢ / mile											

airfare and hotel accommodations paid by Company directly to Delta and Holiday Inn. Balance to be refunded $49.85.

L. Soo

BEST COPY AVAILABLE

DETAIL OF EXPENSES

DATE	Travel From	Travel To	TRANSPORTATION: Auto Mileage	Tolls & Parking	Local Trans. Car Rental	Plane	Train	LIVING EXPENSE: Hotel	Meals	Entertainment	Phone Telegr. Postage	DAILY TOTALS: Meetings Etc.	Misc.
16	Atlanta	San Francisco				275 60							
17	Conf. Registration											10 00	
18	Holiday Inn							45 00					
19	Meals (Day 1)								3 50				
20	Entertaining (Day 1)									27 70			
21	Taxi				4 60								
22	Holiday Inn							46 00					
23	Meals (Day 2)								9 30				
24	Redwood Forest Farm												28 60
25	Entertaining (Day 2)									38 70			
26	Holiday Inn							45 00					
27	Meals (Day 3)								13 85				
28	Holiday Inn							45 00					
29	Meals (Day 4)								16 00				
30	Entertainment									35 00			
31	Taxi				7 00								
1	Entertainment									17 50			
2	Limo to airport				4 00								
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15					15 60	275 60		225 00	42 65	118 90		10 00	28 60
TOTALS FOR PERIOD	TOTAL MILEAGE												716 35
	Mileage	___x___¢/mile										GRAND TOTAL	
	Mileage	___x___¢/ mile											

N. Jordan

airfare and hotel accommodations paid by company directly to Delta and Holiday Inn. Cash advance received $150.00. Balance to be refunded $65.75.

BEST COPY AVAILABLE

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: N. Lee Jordan

FROM: Administrative Assistant

SUBJECT: Expense Report

DATE: (Current)

Please refer to your copy of the Proffitt, Dorsey & Huff, Inc. travel regulations concerning reimbursement of money spent on gratuities and telephone calls. It clearly states that these items will not be all-owed. Therefore, we will not be able to reimburse you for these expenses.

Also, your expenditure for extensive entertaining was in excess of the cash advance you received which leaves a balance due the company of $2.50. This amount will be taken off the reimbursable funds due you.

If you have any questions concerning this, please contact me.

xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Frank E. Soo

FROM: Administrative Assistant

SUBJECT: Expense Report

DATE: (Current)

Please refer to your copy of the Proffitt, Dorsey & Huff, Inc. travel regulations concerning reimbursement of money spent on social functions. Since attendance at the President's Banquet was not mandatory, we have to classify it as a social function and therefore decline to reimburse you the $40 spent on tuxedo rental.

If you have any questions concerning this, please contact me.

xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Modine Jackson

FROM: Administrative Assistant

SUBJECT: Expense Report

DATE: (Current)

Please refer to your copy of the Proffitt, Dorsey & Huff, Inc. travel regulations concerning reimbursement of money spent on meals. Your expenditure on 8/23/-- for meals was in excess of $15 daily plus the 17% high cost allowance. Therefore, we are unable to reimburse you the $3 excess you spent.

If you have any questions concerning this, please contact me.

xx

P D H

proffitt, dorsey & huff, inc.

1257 International Boulevard
Suite 13 - Cain Tower
Atlanta, GA 30001
(404) 222-1133

TO: Stanoslov Gorka

FROM: Administrative Assistant

SUBJECT: Expense Report

DATE: (Current)

Please refer to your copy of the Proffitt, Dorsey & Huff, Inc. travel regulations concerning reimbursement of money spent on meals. Your expenditure on 8/20/-- and 8/23/-- were in excess of $15 daily plus the high cost allowance. Therefore, we are unable to reimburse you for the $.05 excess spent on 8/20/-- or the $13.85 excess spent on 8/23/--.

If you have any questions concerning this, please contact me.

xx

Federal law prohibits discrimination on the basis of race, color or national origin (Title VI of the Civil Rights Act of 1964); sex (Title IX of the Educational Amendments of 1972 and Title II of the Vocational Education Amendments of 1976); or handicap (Section 504 of the Rehabilitation Act of 1973) in educational programs or activities receiving federal financial assistance.

Employees, students and the general public are hereby notified that the Georgia Department of Education does not discriminate in any educational programs or activities or in employment policies.

The following individuals have been designated as the employees responsible for coordinating the department's effort to implement this nondiscriminatory policy.

Title II - Loydia Webber, Vocational Equity Coordinator
Title VI - Peyton Williams Jr., Associate Superintendent of State Schools and Special Services
Title IX - Myra Tolbert, Coordinator
Section 504 - Jane Lee, Coordinator of Special Education

Inquiries concerning the application of Title II, Title VI, Title IX or Section 504 to the policies and practices of the department may be addressed to the persons listed above at the Georgia Department of Education, Twin Towers East, Atlanta 30334; to the Regional Office for Civil Rights, Atlanta 30323; or to the Director, Office for Civil Rights, Education Department, Washington, D.C. 20201.